

ACCEPTABLE DOCUMENTATION FOR 2020 TAX INFORMATION

Tax Filers:

- **IRS Data Retrieval Tool (preferred method):** see back of this form for detailed instructions
- **Request a Tax Return Transcript from the IRS**
 1. Go online to [irs.gov](https://www.irs.gov)
 2. Select “Get your Tax Record”
 3. Select “Get Transcript Online” to request a PDF copy of your Return Transcript
 - a. If you are unable to use “Get Transcript Online”, select “Get Transcript by Mail”. Please note this option takes 5-10 business days to be mailed.
 - b. If you are unable to use the “Get Transcript Online” and “Get Transcript by Mail”, you will need to complete and submit an IRS Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) to the IRS. **Please check box 6a (Return Transcript) and complete form. Refer to page 2 of the form to determine the IRS Office your request should be submitted to.**
 4. Follow the prompts given to register a username
 5. Once registered, be sure to request your Tax Transcript and submit a copy to our office
- If you are unable to use the *IRS Data Retrieval Tool* or get a copy of your *Return Transcript* you can submit a **signed copy** of your 2020-1040 Federal Tax Return along with **all schedules** to our office

Non-Tax Filers:

- **Verification of Non-Filing Letter from the IRS**

Required for Independent Students (and their spouses) and parents who did not file a 2020 federal tax return

1. Go online to [irs.gov](https://www.irs.gov)
2. Select “Get your Tax Record”
3. Select “Get Transcript Online” to request a PDF copy of your Verification of Non-Filing Letter
 - a. If you are unable to use “Get Transcript Online”, select “Get Transcript by Mail” to have your verification of Non-Filing Letter mailed to you. Please note this option takes 5-10 business days to be mailed.
 - c. If you are unable to use the “Get Transcript Online” and “Get Transcript by Mail”, you will need to complete and submit an IRS Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) to the IRS. **Please check box 7 and complete form. Please refer to page 2 of the form to determine the IRS Office your request should be submitted to.**
4. Follow the prompts given to register a username
5. Once registered, be sure to request your Verification of Non-Filing Letter and submit a copy to our office

***BE SURE TO WRITE STUDENT’S NAME AND ID NUMBER ON ALL DOCUMENTS ***

SIMPLE STEPS TO TRANSFER TAX INFORMATION INTO YOUR FAFSA FORM

The IRS Data Retrieval Tool (IRS DRT) Electronically Transfers Your Federal Tax Return Information Into Your FAFSA Form

WHY

EASY Transfer info with the click of a button.

FAST Instantly retrieve your information.

ACCURATE Correctly fill in your information.

HOW



1 Log in to your current FAFSA form or start a new application at fafsa.gov.

3 Click the "Link to IRS" button and log in with your FSA ID to be transferred to the IRS to retrieve your info.

5 Check the "Transfer My Tax Information into the FAFSA form" box, and click the "Transfer Now" button.*

2 In the finances section of the online form, you will see a "Link to IRS" button if you are eligible to use the IRS DRT.

4 Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the "Submit" button.

6 You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form.

*For your protection, your tax information will not be displayed on either the IRS site or fafsa.gov.

The IRS DRT can be used by both students and parents.

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To learn more about the IRS DRT, visit StudentAid.gov/irsdrt