



**Section B: Student's 2019 Tax & Income Information** – *To be completed by the student*

If you have an **Unusual Tax Filing Circumstance**, please indicate the circumstance and see Page 3 for additional instructions.

Check the box that applies:

- I have filed a 2019 Federal Income Tax Return and I have used or *will* use the IRS Data Retrieval Tool in FAFSA to transfer my 2019 IRS income tax information into my FAFSA.
- I have filed a 2019 Federal Income Tax Return and I did not (or could not) transfer my 2019 income tax information into my FAFSA using the IRS Data Retrieval Tool and I have or *will* provide a copy of my 2019 Tax Return Transcript from the IRS. **(Please note: This is NOT your Form 1040).** See instructions on Page 2.
- I have not filed (and am not required to file) a 2019 Federal income tax return and I have no income earned from work in 2019.
- I have not filed (and am not required to file) a 2019 Federal income tax return, but I earned income from work in 2019. I have listed below the names of all employers, the amount earned from each employer in 2019, and I **have attached copies of ALL 2019 W-2(s) or a Wage & Income Transcript from the IRS** for each source of income listed.

Employer's Name	Amount Earned	W-2 provided?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

**CERTIFICATION** – *To be completed by the student. The following signatures certify that all of the information reported on this worksheet is complete and correct.* **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student Signature (required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (optional)

\_\_\_\_\_  
Date

## Instructions for Providing Tax Information

### **Instructions for using the IRS Data Retrieval Tool (DRT) in FAFSA**

1. Login to the student's FAFSA with the student's FSA ID.
2. In the Parent and/or Student Financial Information Section, complete the questions about whether taxes have been filed, the filing status, and whether a Puerto Rican/foreign tax return were filed for 2019.
3. If you are eligible to use the DRT, a "LINK TO IRS" button should appear. Click it.
4. On the next page, click on the "PROCEED TO IRS SITE" button.
5. Your name and information should appear on the IRS site. Enter your information and address **exactly** as it appears on your 2019 Federal Income Tax Return. Click submit.
6. You will be taken to a page that confirms which items will be transferred from the IRS to the FAFSA. Under the "Transfer My Tax Information into FAFSA" heading, check the box to confirm the transfer of the data and click on the "Transfer Now" button. You will be taken back to the FAFSA.
7. Complete, sign, and submit the remaining portions of the FAFSA.

**Note:** Individuals filing as Married Filing Separately are not eligible to use the IRS DRT and must provide the Tax Return Transcripts (see instructions below) or signed copies of the 2019 income tax return and all applicable schedules for each individual.

### **Instructions for requesting the Tax Return Transcript or Verification of Non-Filing**

1. Go to [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript)
2. Select either "Get Transcript Online" to download most transcripts (requires IRS account) or "Get Transcript by Mail" to request a transcript to be mailed (Tax Return Transcript only)
3. Follow instructions for each method
4. Download or request the needed items
  - a. The Tax Return Transcript will be listed as the Return Transcript for tax filers.
  - b. Verification of Non-Filing Letter will also be listed as Return Transcript for non-tax filers.
  - c. Note: the Verification of Non-Filing Form may also be requested by filing Form 4506-T from the IRS.

### Unusual Tax Filing Circumstances

In some cases, you may not be able to submit a Tax Return Transcript or use the IRS DRT in FAFSA to provide your tax information. Please refer to the situations below for additional information.

### **Individuals Granted a Filing Extension by the IRS**

An individual who is required to file a 2019 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2019, must provide the following items:

- Copy of IRS Form 4868 that was filed with the IRS for tax year 2019
- Copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019
- Verification of Non-Filing (VNF) Letter (see instructions on Page 3) dated on or after October 1, 2020 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation.
- W-2(s) for each source of employment income received or an equivalent document for tax year 2019
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2019 (preferably from an accountant)

### **Individuals who filed an Amended Return**

An individual who amended a U.S. Income Tax Return for tax year 2019 needs to provide the following documents:

- **Signed and dated** copy of the 2019 IRS Form 1040X that was filed with the IRS, **AND**
  - o Tax information submitted in the FAFSA using the **IRS Data Retrieval Tool, OR**
  - o A **2019 IRS Tax Return Transcript, OR**

- A signed copy of the **2019 IRS Form 1040 and the applicable schedules** that were filed with the IRS

### **Individuals who are Victims of Tax Administration Identity Theft**

An individual who was the victim of IRS tax-related identify theft must provide the following items:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2019 IRS Form 1040 and applicable schedules.
- A statement signed and dated by the tax filer indicating that he/she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identify theft.

### **Individuals who filed Non-IRS Income Tax Returns**

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of their income tax return that was filed with the relevant tax authority. However, if the Office of Financial Aid questions the accuracy of the information on the signed coy of the income tax return, the tax filer must provide a copy of the tax account information issued by the relevant tax authority before verification can be completed.