



**Section B: Student's 2020 Tax & Income Information** – *To be completed by the student*

If you have an **Unusual Tax Filing Circumstance**, please indicate the circumstance, and see Pages 3 & 4 for additional instructions.

Check the options that apply:

- I, the student, and/or my spouse (if applicable) have filed a 2020 Federal Income Tax Return, **AND**
  - I/we have used or will use the **IRS Data Retrieval Tool** in FAFSA to transfer my/our 2020 IRS income tax information into my FAFSA, **OR**
  - I/we have provided or will provide a copy of my/our **2020 Tax Return Transcript** from the IRS (See Page 3) or a signed copy of my/our **2020 federal income tax return and applicable schedules**

**OR**

- I, the student, and/or my spouse (if applicable) have not filed, and I/we are not required to file a 2020 Federal income tax return, **and** I/we have provided or will provide a **Verification of Non-Filing Letter** from the IRS (see Page 3) **AND**
  - I/we have no income earned from work in 2020, **OR**
  - I/we earned income from work in 2020. I have listed below the names of all employers, the amount earned from each employer in 2020, and I have provided or will provide **copies of ALL 2020 W-2(s) or a 2020 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 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 2020.
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 2020 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 2020 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 2020 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2020, must provide the following items:

- Copy of IRS Form 4868 that was filed with the IRS for tax year 2020
- Copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2020
- 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 2020
- 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 2020 (preferably from an accountant)

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

An individual who amended a U.S. Income Tax Return for tax year 2020 needs to provide the following documents:

- **Signed and dated** copy of the 2020 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 2020 IRS Tax Return Transcript, OR**
  - o A signed copy of the **2020 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 2020 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.