

Refer to the instructions below to transfer your/your parent(s)' tax information directly into the FAFSA, request a Tax Return Transcript, or request a Verification of Non-filing Letter from the IRS. Special situations which may require additional documentation are listed below.

Transferring Tax Information into the FAFSA

- Log into your FAFSA at <http://www.fafsa.ed.gov>.
- Choose the 2023-2024 FAFSA and click on **Make FAFSA Corrections**.
- Navigate to **Financial Information** and follow the prompts to link to the IRS.
- Check the box to transfer the information and click on **Transfer Now**, or the information will not be imported.
- Repeat the process for the student or parent, as necessary.
- Be sure to **submit** the updates to your FAFSA before logging off.
- Revised FAFSA results will be received by the Office of Financial Assistance in 5-10 business days.
- If the data received after transferring your tax information into the FAFSA indicates that you or your parent(s) amended the tax return, a signed copy of the 1040X will be required. In some cases, the changes were made directly by the IRS, and you/your parent(s) will have a letter from the IRS indicating this change.

Requesting a Tax Return Transcript from the IRS

- If you/your parent are unable to locate a copy of the Tax Return, you may request one from the IRS.
- Go to <http://www.irs.gov> and click on **Get Your Tax Record**.
- Click on **Get Transcript by Mail**, and follow the prompts using the primary tax-payer's information.
- Choose **Tax Return Transcript** as the requested form, and **2021** as the tax year. **Enter the student's ID number in the Customer File Number box**. The transcript will be mailed to the address on the tax return. We are unable to accept an "Account Transcript," as it does not contain all the required information.
- Repeat the process for the student or parent, as necessary.
- If you or your parent(s) amended the 2021 tax return, a signed copy of the 1040X will be required. In some cases, the changes were made directly by the IRS, and you/your parent(s) will have a letter from the IRS indicating this change.

Requesting a Verification of Non-Filing Letter from the IRS

- Download IRS form 4506T-EZ from <http://www.irs.gov>
- Fill in items 1-4 and **enter the student's ID number in box 5b, Customer File Number**.
- Check Box 7 and enter **12/31/2021** in Box 9.
- Mail or fax the completed form to the address/number indicated in the 4506T instructions.
- If your parent(s) worked in 2021, they must also submit copies of all sources of income.
 - Income documents may include: W2s, 1099s, Social Security/Disability statements, Interest Income, etc.
- The letter will be mailed to the address on the 4506T within 5-10 business days.

Requesting a Wage and Income Statement from the IRS

- Go to <http://www.irs.gov> and click on **Get Your Tax Record**.
- Click on **Get Transcript by Mail**, and follow the prompts using the primary tax-payer's information.
- Choose **Wage and Income Statement** as the requested form, and **2021** as the tax year. **Enter your student ID number in the Customer File Number box**. The transcript will be mailed to the address on the tax return.

Special Situations (may require additional documentation):

- If your parents are separated but not divorced, they may still both be required to provide tax information.
- If your parents are married but filed taxes separately, you cannot transfer their information into the FAFSA. Both will need to provide signed copies of their returns or request a Tax Return Transcript and turn in a copy.
- Biological/adoptive parents who are unmarried but living together must both provide tax information on the FAFSA as well as Tax Returns for the verification process.
- If your custodial parent is remarried, the step-parent must provide tax information on the FAFSA and will be required to submit a Tax Return for the verification process, if they filed separately.
- If your parents were married and filed a joint return in 2021, but are now divorced, you may submit a Parent Marital Status form and a **Wage and Income statement** from the IRS to remove the non-custodial parent's income from the FAFSA.