

Options for Submitting 2021 Tax Information for 2023-24 FAFSA Verification

A. Use the IRS 'Data Retrieval Tool' on your 2023-24 FAFSA Application

1. Log into your current FAFSA at www.studentaid.gov.
2. Select **Make FAFSA Correction**.
3. Click on the **'Student/Parent Financials.'**
4. You must indicate that the student/parent(s) has **already completed** a 2021 Federal Tax Return.
5. Select the type of income tax return filed
 - a. Note that the student/parent will not be able to use the DRT if a 'traditional' 1040 was not filed; or
 - b. If student/parent marital status does not match tax filing status
6. Click 'LINK TO IRS'.
7. Select 'parent 1' or 'parent 2' and use their FSA ID to link to DRT.
8. Select 'Proceed to IRS Site.'
9. Once on the IRS website, click "OK" to access the IRS form.
10. Provide the tax filer's filing status and street address **exactly** as it appears on the 2021 Federal tax return.
11. Select the **Transfer** box and then select the **Transfer Now** button.
12. Once back to the FAFSA, proceed to the signature page to **SIGN** and **SUBMIT** the FAFSA corrections.

B. Request a Federal Tax Return Transcript

1. Go to: <https://www.irs.gov/individuals/get-transcript>
2. Select 'Get Transcript Online'
3. Create an account (using DOB, SSN, prior tax years' information, phone number and a personal account number)
4. Select 'Higher Education/Student Aid' as the reason for your request
5. Under **'RETURN TRANSCRIPT'** (not 'Record of Account Transcript') select 2021
6. If you are unable to obtain a copy of the IRS Tax Return Transcript via the IRS website, you may submit a manual request using IRS Form 4506-T or by contacting your local tax office to request one.

C. Submit a SIGNED Copy of Student/Parent Tax Return

1. Submit a **signed** copy of student/parent IRS form 1040 **along with schedules 1 – 3** (if applicable)

D. Request IRS Verification of Non-filing if Student/Parent Did Not File a 2021 Tax Return (ONLY for independent students and parents of dependent students)

1. Visit the IRS website at www.irs.gov.
2. Select 'Get Your Tax Record.'
3. Select 'Get Transcript Online'
4. Create an account (using DOB, SSN, prior tax years' information, phone number and a personal account number)
5. Select 'Higher Education/Student Aid' as the reason for your request
6. Select **Verification of Non-filing Letter** for **2021**.
7. If you are unable to obtain a copy of the IRS Verification of Non-filing letter via the IRS website, you may submit a manual request using IRS Form 4506-T or by calling 800-908-9946.

**** DO NOT SEND SENSITIVE PERSONALLY IDENTIFIABLE INFORMATION VIA UNSECURE EMAIL ****

To send documents via a secure link:

<https://sendsecure.xmedius.com/r/2ba96822f2104ad2b79dbba706c3d788>