



Instructions for Submitting Tax Information from the IRS for 2023-2024 Financial Aid Verification

If your financial aid application is selected for review in a process called “verification”, you must provide the Financial Aid Office additional documentation to check the accuracy of information submitted on your FAFSA as mandated by the U.S. Department of Education. If you, your spouse and/or your parents(s) filed an income tax return in 2021, you must submit a copy of your, your spouse’s and /or your parent(s)’ IRS Tax Return Transcript or use the IRS Data Retrieval Tool within the FAFSA. If you, your spouse and/or your parent(s) did not file a 2021 income tax return you must submit a Verification of Non-Filing status letter from the IRS. Dependent students do not need to submit Verification of Non-Filing status letter for themselves but are required to submit one for their parent(s).

IRS Data Retrieval (DRT) Instruction:

- Go to <https://studentaid.gov> and select the 2023-2024 FAFSA, choose “FAFSA Corrections”, and go to the “Financial Information” section and change the tax filing status to “Already Completed” if needed.
- Update your tax information using the Retrieval Tool Option. Be sure to enter your address exactly as it appears on your tax return. Once the retrieval tool is successful, submit your correction.

If you are unable to use the Data Retrieval Tool, you may request a 2021 IRS Tax Return Transcript from the IRS. *(If you and your spouse filed separately for 2021, a separate 2021 IRS Tax Return transcript must be provided for both individuals. If you are a dependent student and your parents filed separate tax returns, a 2021 IRS Tax Return transcript must be provided for each parent). Must submit cover letter along with transcript.*

There are a number of ways to request a Tax Return Transcript from the IRS:

- 1.) Go to <https://www.irs.gov/>
 - Click ‘Get a Tax Transcript by Mail’
 - Provide SSN, date of birth, and address of person listed on the 2021 IRS Income Tax Return
 - Select “IRS Tax Return Transcript” for tax year 2021 *(Do not select the Account Transcript)*
 - The transcript is mailed to the address on the 2021 IRS Income Tax Return
 - 2.) Call the IRS at 1-800-908-9946
 - 3.) Complete IRS Form 4506-T available online at <https://www.irs.gov/> or in the Financial Aid Office
- ❖ **If you or your spouse or parent were not required to file a 2021 IRS Income Tax Return, you must submit a 2021 IRS Verification of Non-filing Letter. Must submit cover letter along with status letter.**
- 1.) Go to <https://www.irs.gov/>
 - Click on “Get a Tax Transcript”
 - Click on Related Forms, Form 4506-T
 - Check Box 7, Verification of Non-Filing, and mail to IRS
- ❖ **Verification of 2021 wages – Order a Wage Transcript from the IRS.**
- Go to <https://www.irs.gov/>
 - Click “Get a Tax Transcript Online” and request “Wage Transcripts” for 2021