



## **IRS Data Retrieval Tool (This option will streamline and expedite the processing of your financial aid application.)**

1. Log in to your current FAFSA form at [fafsa.gov](https://fafsa.gov).
2. In the finances section of the online form, you will see a “Link to IRS” button if you are eligible to use the IRS DRT.
3. Click the “Link to IRS” button and log in with your FSA ID to be transferred to the IRS to retrieve your info.
4. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the “Submit” button.
5. Check the “Transfer My Tax Information into the FAFSA form” box and click the “Transfer Now” button.
6. On the “Sign & Submit” page, read the certification statement, and check the box indicating that you agree with the statement. Then select “Submit My FAFSA” at the bottom of the page.

**Although the IRS Data Retrieval Tool is the preferred method for submitting tax information, the Department of Education is currently allowing institutions to accept personal copies of federal tax returns (Federal Form 1040 AND applicable Schedules 1, 2 and/or 3) as long as they are signed.**

## **Special situations that require alternative or additional documentation:**

- Students/Parents who are married, but filed separate 2021 Federal Tax Returns:
  - Submit signed copies of the 2021 Federal Tax Returns (**Federal Form 1040 AND applicable Schedules 1, 2 and/or 3**) for parent and spouse (if dependent) or student and spouse (if independent).
- Students/Parents whose marital status has changed after filing the 2021 Federal Tax Return:
  - If separated or divorced, submit a signed copy of the 2021 Federal Tax Return (**Federal Form 1040 AND applicable Schedules 1, 2 and/or 3**) AND copies of ALL 2021 W-2(s), 1099(s) for parent and ex-spouse (if dependent) or student and ex-spouse (if independent). (Note: If either tax-filer had business income submit Schedule C and/or Schedule K-1 or if either tax-filer had farm income submit Schedule F.)
  - If married/re-married, submit signed copies of the 2021 Federal Tax Returns (**Federal Form 1040 AND applicable Schedules 1, 2 and/or 3**) for parent and spouse (if dependent) or student and spouse (if independent).
- Parents/Independent students who did not and will not file a 2021 Federal Tax Return:
  - Submit copies of all 2021 W-2s.
  - Independent students and parents of dependent students are required to submit Verification of Non-Filing from the IRS dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS.
  - Dependent students may be required to submit Verification of Non-Filing from the IRS if conflicting information exists.
- Students/Parents who amended or the IRS made corrections to their 2021 Federal Tax Return:
  - If the tax-filer used the IRS Data Retrieval Tool, submit a signed copy of the 2021 1040X.
  - If the tax-filer did not use the IRS Data Retrieval Tool, submit a signed copy of the original 2021 Federal Tax Return (**Federal Form 1040 AND applicable Schedules 1, 2 and/or 3**) along with a signed copy of the 2021 1040X.
  - If the IRS made the correction on the tax-filer’s behalf, there will not be a 1040X. Instead, the tax-filer will need to submit a 2021 IRS Record of Account. This documentation may be requested online at <https://www.irs.gov/individuals/get-transcript>.
- Students/Parents who filed a 2021 foreign tax return:
  - Submit a signed copy of the 2021 foreign tax return.
  - Contact the Financial Assistance Office for further guidance.
- Students/Parents who were victims of tax administration identity theft:
  - Contact the Financial Assistance Office for further guidance.
- Students/Parents who were granted a filing extension (beyond the October 15 automatic extension) by the IRS:
  - Contact the Financial Assistance Office for further guidance.

## **Verification of Non-Filing**

The Verification of Non-Filing Letter is proof from the IRS that you did not file a return. To request Verification of Non-Filing visit <https://www.irs.gov/individuals/get-transcript>.

## **IRS Tax Return Transcript**

In some circumstances it may be necessary for you to submit a 2021 IRS Tax Return Transcript. To request the IRS Tax Return Transcript, visit <https://www.irs.gov/individuals/get-transcript>.

## **Wage and Income Transcript**

In some circumstances it may be necessary for you to submit a 2021 Wage and Income Transcript. The Wage and Income Transcript, visit <https://www.irs.gov/individuals/get-transcript>.

**Write the student’s name and USI student ID number on the top of all tax documents submitted to the Financial Assistance Office.**