

2022 Tax & Income Information *To be completed by the student*

If you have an **Unusual Tax Filing Circumstance**, please indicate the circumstance, and see Pages 4 & 5 **OR** additional instructions.

Check the options that apply:

I, the student, and/or my spouse (if applicable) have filed a 2022 Federal Income Tax Return, **AND**

- I/we have used or will use the **IRS Data Retrieval Tool** in FAFSA to transfer my/our 2022 IRS income tax information into my FAFSA, **OR**
- I/we have provided or will provide a copy of my **2022 Tax Return Transcript** from the IRS (See Page 4) or a signed copy of my/our **2022 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 2022 Federal income tax return, **and** I/we have provided or will provide a **Verification of Non-Filing Letter** from the IRS (see Page 4) **AND**

- I/we have no income earned from work in 2022, **OR**
- ~~_____~~

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 Parent and/or 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 2022.
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 2022 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 2022 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
2. Select either "Get Transcript Online" to download most transcripts (requires IRS account) or "Get Transcript by mail"

Individuals who filed an Amended Return

An individual who amended a U.S. Income Tax Return for tax year 2022 needs to provide the following documents:

Signed and dated copy of the 2022 IRS Form 1040X that was filed with the IRS, **AND**

- Tax information submitted in the FAFSA using the **IRS Data Retrieval Tool, OR**
- A **2022 IRS Tax Return Transcript, OR**
- A signed copy of the **2022 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 2022 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.