

FMU ID #: _____

Section C: Student/Spouse Tax Filing Status

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you and/or your spouse file, or will you file, a 2017 Federal IRS Tax Return?
<i>If Yes...</i>	If you and/or your spouse filed, or will file a 2017 Tax Return, a copy of your Tax Return Transcript is required. You may also utilize the IRS Data Retrieval Tool (DRT) within your FAFSA application to satisfy this requirement.
<i>If No...</i>	<p>If you and/or your spouse did not, and were not required to file a 2017 Tax Return,</p> <ul style="list-style-type: none"> • Complete the NON-TAX FILER STATEMENT form; • Provide documentation from the IRS dated on or after October 1, 2018 that indicates a 2017 income tax return was not filed (Form 4506-T) or online (https://www.irs.gov/individuals/get-transcript); • ^{and} Provide copies of W-2's and/or 1099 forms from ALL employers. <i>Replacement copies of W-2's may be obtained from your employer or by requesting a Wage and Income Transcript from the IRS (www.irs.gov).</i>

Section D: Parent/Step-Parent Filing Status (if applicable)

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did your parent(s), including your step-parent (if applicable) file, or will they file, a 2017 Federal IRS Tax Return?
<i>If Yes...</i>	If your parent(s), including your step-parent (if applicable), filed, or will file a 2017 Tax Return, a copy of their Tax Return Transcript is required. They may also utilize the IRS Data Retrieval Tool (DRT) within your FAFSA application to satisfy this requirement.
<i>If No...</i>	<p>If your parent(s) including your step-parent (if applicable) did not, and were not required to file a 2017 Tax Return, they must</p> <ul style="list-style-type: none"> • Complete the NON-TAX FILER STATEMENT form; • Provide documentation from the IRS dated on or after October 1, 2018 that indicates a 2017 income tax return was not filed (Form 4506-T) or online (https://www.irs.gov/individuals/get-transcript); • ^{and} Provide copies of W-2's and/or 1099 forms from ALL employers. <i>Replacement copies of W-2's may be obtained from your employer or by requesting a Wage and Income Transcript from the IRS (www.irs.gov).</i>

Section E: Certification and Signature(s)

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.

Student's Signature

Date

Parent's Signature (Requires for Dependent Students ONLY)

Date

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Instructions for obtaining IRS Tax Return Transcript

FAFSA IRS Data Retrieval Tool

Recommended

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to www.fafsa.gov and select Login.
- Select “Make FAFSA Corrections”
- Select the Financial Information tab and follow the Instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



IMPORTANT: If you use the Data Retrieval Tool to link your tax information, please do not submit paper copies of Tax Return Transcripts unless requested by the Financial Aid Office.

Don't want to use the Data Retrieval Tool?

If you are unable to use the Data Retrieval Tool, or you choose not to, you must submit:

1. a paper copy of all required Tax Return Transcript(s) and
2. copies of W-2's or 1099 forms from ALL employers (student and parent). Replacement copies of W-2's can be obtained from your employer or you may obtain a Wage and Income Transcript from the IRS (www.IRS.gov).

Options for getting your IRS Tax Return Transcript

Online Request

- Go to www.IRS.gov
- Under the **Tools** heading on the IRS homepage, select "Get Transcript of Your Tax Records."
- Select "[Get Transcript ONLINE](#)" or "[Get Transcript by MAIL.](#)"
- Make sure to request the "**IRS Tax Return Transcript**" and NOT the "IRS Tax Account Transcript."

Telephone Request - 1-800-908-9946

Paper Request Form - IRS Form 4506T-EZ or IRS [Form 4506-T](#)

Tax Filers with Special Circumstances

Individuals Granted a Filing Extension by the IRS - Provide the following:

- copy of IRS Form 4868 that was filed with the IRS for the tax year;
- a copy of the IRS's approval of an extension beyond the automatic six-month extension (if applicable);
- a copy of W-2 forms for each source of employment income received for the tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the tax year; and
- documentation from the IRS dated on or after October 1, 2018 that indicates a 2017 income tax return was not filed

Individuals Who Filed an Amended IRS Income Tax Return - Provide a copy of the IRS tax return transcript and a signed copy of the IRS Form 1040X.

Individuals Who Were Victims of Tax Administration Identity Theft - Call the IRS at 1-800-908-4490 and complete [Identity Theft Affidavit \(Form 14039\)](#).

Individuals Who Filed Non-US Income Tax Returns - Provide a signed copy of that income tax return(s); or a transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for the tax year.