

Student's Last Name

Student's First Name

MI

Student ID #

C. Student (and Spouse) Income and Tax Information

Please check the box that applies to you (the student). Please note: some fields will require additional action and documentation from you. If you need additional assistance, please see page 3 for instructions and tips or contact the Office of Financial Aid.

I, the student, (and my spouse, if applicable) filed a 2020 IRS income Tax Return and am providing my tax information by:

Using the IRS Data Retrieval Tool on my FAFSA on the Web to transfer 2020 IRS income tax return information

-OR-

Have not yet used the IRS Data Retrieval Tool in my FAFSA, but will use the tool to transfer 2020 IRS income tax return

-OR-

Providing a signed copy of my (and my spouse's, if applicable) 2020 IRS Tax Return, Schedule 1, Schedule 2, Schedule 3, and Schedule K-1 or 2020 Tax Return Transcript obtained from the IRS (at www.irs.gov)

-OR-

I, the student and/or spouse, **will not file and am not required** to file a 2020 IRS income tax return and was not employed and had no income earned from work in 2020. I will provide a Verification of Non-Filing letter from the IRS (obtained from www.irs.gov, see page 3 for help)

-OR-

I, the student and/or spouse, will not file and not required to file a 2020 IRS income tax return. I was employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020 and whether an IRS W-2 form or an equivalent document is provided. Please complete the chart below and report your employer and earnings **even if your employer did not issue you a W-2.**

Employer's Name	IRS W-2 or and Equivalent Document Provided?	Annual Amount Earned in 2020
<i>XYZ Shipping (Example)</i>	<i>Yes</i>	<i>\$8,054</i>

D. Student (and Spouse) Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fine, jailed, or both.**

Student's Signature (Required)

Date

Spouse's Signature (Required if married)

Date

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Instructions Page

Please fill out page 1 and 2 to the best of your ability. This page does not need to be submitted to the Office of Financial Aid with page 1 and 2. If you have any questions, please feel free to contact the Office of Financial Aid at faoffice@beloit.edu or call 608-363-2663.

How to use the IRS Data Retrieval Tool (DRT) to import tax data into the FAFSA

1. Go to www.studentaid.gov, click the white "Login" button and log in using the student's FSA ID and password.
2. Click "Edit FAFSA form" on the homepage and create a Save Key.
3. Click on the "Parent Financials" tab.
4. For the question "Have your parents completed their IRS income tax return" choose "Already Completed."
5. In the IRS Data Retrieval Tool box click proceed to the IRS.
6. Select answer to "which parent are you," enter parent's FSA ID and click "Link to IRS."
7. Click "OK" to "Leaving FAFSA on the Web."
8. Click "OK" to the pop-up message "This Gov't System is for Authorized Use Only."
9. Enter information request (Filing Status, Address, etc.) and click "Submit." If the transfer is successful, you may proceed to step 10. If any of the answers you reported does not match the IRS records, the search for the tax data will not be successful. Please be sure to include correct zip codes, apartment numbers, PO boxes, etc. The address must match the address reported on the most recent tax return and the parent SSNs must be correct.
10. Click "Transfer my tax information into the FAFSA" on the left of the page and click "Transfer Now" on the right.
11. Repeat this process for student if the student has filed taxes- If not, click "Next" at the bottom of the Financial Information Page.
12. You will be directed back to the FAFSA webpage. At the "List of Changes," review, then scroll to the bottom and click "Next."
13. Click "Sign and Submit" and follow instructions to submit the changes.
14. You will receive a confirmation number and a confirmation email.

Please note: Independent students will not need to submit parent information but will follow the same steps for entering their own tax information.

How to request an IRS Tax Return Transcript

There are four different ways to request a tax return transcript:

- 1) **ONLINE:** Go to IRS.gov, click on "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two step authentication. If you are unable to create an account online, see #2.
- 2) **MAIL:** Go to IRS.gov, click "Get Your Tax Record" and then click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 3) **BY PHONE:** To order by phone, call 800-908-9946 and follow the prompts.
- 4) **PAPER:** Complete Form 4506-T (can be obtained from IRS.gov).

How to request a Verification of Non-Filing Letter

The Verification of Non-Filing Letter provides proof that the IRS has no record of a filed Form 1040, 1040A, or 1040EZ for the year you requested. It doesn't indicate whether you were required to file a return for that year.

There are two ways to request a Verification of Non-Filing Letter:

- 1) **ONLINE:** (For individuals who have filed taxes in prior years only. If you have never filed a tax return before, please see #2) Go to IRS.gov and click on Get Your Tax Record. Click "Get Transcript ONLINE." If at any point you cannot validate your identity, please see #2.
- 2) **Paper Request:** Download the IRS Form 4506-T at IRS.gov. Complete the form and submit to the IRS using the address or fax number provided on page 2 of the form. You can expect to receive the Verification of Non-Filing via mail within 10 days.

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Having issues with requesting these items from the IRS?

The IRS.gov help desk can be reached at 800-829-1040.