



# Required Income & Tax Information

## Step 3 and Step 4

### **All Student and Parent Tax Filers: If possible, always use the IRS Data Retrieval Tool on the FAFSA.**

If you did not use the IRS Data Retrieval Tool, you **must** request an IRS 2019 Tax Return Transcript for Steps 3 and 4 by calling the IRS at **800.908.9946**. Or, you can also go online to [www.irs.gov](http://www.irs.gov); click Get My Tax Record, then click Get Transcript Online and follow the directions.

### **Parents that DID NOT file a 2019 Federal Tax Return: You must submit an IRS Verification of Non-filing Letter.**

Go to <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> to get Form 4506-T. Print it out and carefully complete the entire form, making sure to check Box 7 to request the IRS Non-Filing Verification letter. Also be sure to use 12/31/2019 for the correct tax filing period in #9. Mail the form to the IRS at the appropriate address in the middle column of page 2.

### **STEP 3: STUDENT TAX TRANSCRIPT & INCOME INFORMATION**

#### **CHECK THE ONE (1) BOX THAT APPLIES:**

- I was not employed and had no income earned from work in **2019**.
- I used the IRS Data Retrieval Tool to retrieve and transfer **2019** IRS income information into FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. ...continue to STEP 4.
- I was unable or chose not to use the IRS Data Retrieval Tool, and I/we will submit or have submitted to the school a **2019 IRS Tax Return Transcript** (**NOT** a copy of the income tax return) ...continue to STEP 4.
- I did not and am not required to file a **2019** Federal Income Tax Return. I/we have completed the table below and attached **ALL 2019 W-2 forms** (including work-study)

Source(s) of Income (fill out only if you did NOT file)	Amount Earned in 2019
	\$
	\$
	\$

### **STEP 4: PARENT TAX TRANSCRIPTS & INCOME INFORMATION**

#### **CHECK THE ONE (1) BOX THAT APPLIES:**

- Student's parent(s) had no income earned from work in **2019** - **You must Submit IRS Verification of Non-filing Letter – see above.**
- Student's parent(s) used the IRS Data Retrieval Tool to retrieve and transfer **2019** IRS income information into FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. ...Continue to STEP 5.
- Student's parent(s) were unable or chose not to use the IRS Data Retrieval Tool, and will submit or have submitted to the school a **2019 IRS Tax Return Transcript** (**NOT** a copy of the income tax return). ... Continue to STEP 5.
- Student's parent(s) are not required to file a **2019** Federal Income Tax Return. Student's parent(s) have completed the table below and attached **ALL 2019 W-2 forms.** – Also, **You must Submit IRS Verification of Non-filing Letter – see above.**

Source(s) of Income (fill out only if you did NOT file)	Amount Earned in 2019
	\$
	\$
	\$

### **STEP 5: SIGN THIS WORKSHEET – CAN NOT BE SIGNED ELECTRONICALLY**

I/We certify that all the information reported on this worksheet is complete and correct. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature (required)

\_\_\_\_\_  
Date