

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 2020 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; click Get My Tax Record, then click Get Transcript Online and follow the directions.

If an Amended Return has been filed: A copy of the Original Tax Return (IRS 1040) and the Amended Return (IRS 1040x) must be provided to the Financial Aid office.

Parents that DID NOT file a 2020 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 12/31/2020 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 **2020**
- I used the IRS Data Retrieval Tool to retrieve and transfer **2020** 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 **2020 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 **2020** Federal Income Tax Return. I/we have completed the table below and attached **ALL 2020 W-2 forms** (including work-study)

Source(s) of Income (fill out only if you did NOT file)	Amount Earned in 2020
	\$
	\$
	\$

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 **2020** - **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 **2020** 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 **2020 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 **2020** Federal Income Tax Return. Student's parent(s) have completed the table below and attached **ALL 2020 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 2020
	\$
	\$
	\$

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