


Verification Worksheet Instructions


1. You must complete the attached Verification Worksheet
2. Additional Guidance for Section C Provide Income Tax Information for yourself and spouse (if married) using one of the following methods below, unless not required to file per the IRS regulations (check appropriate box on Verification Worksheet).

- **IRS Data Retrieval Tool (DRT) for Free Application for Federal Student Aid (FAFSA)**
Certain exclusions apply and if you are unable to use DRT please use another method below.

****The data that is transferred from the IRS will not be viewable due to enhanced security of sensitive information. Once the data is transferred, "Transferred from the IRS" will be in place of any other information. ** Do not correct transferred information. You will receive a letter in the mail letting you know that DRT has retrieved your tax information.**

1. Log onto www.fafsa.gov
2. Select "Make FAFSA Correction"
3. Select Financial Information Tab
4. Answer the questions accordingly

5. If the  Icon does not appear, **you will need to obtain appropriate tax information using one of the additional methods below instead.**

6. If the  Icon appears, select "Link to IRS" button
7. Select proceed to IRS site and Press "OK"
8. Enter the address, city, state, and zip code exactly as reported on your tax form
9. Then check "Transfer My Tax Information into the FAFSA"
10. Click "Transfer Now" button
11. Proceed to the end of FAFSA application then submit
12. Make sure the confirmation page appears after clicking the submit button

❖ **Contact IRS to Request IRS Tax Return Transcript using one of the following:**

- Online: at <http://www.irs.gov/Individuals/Get-Transcript>
 - Select "Get Transcript by Mail" or "Get Transcript Online" Please note, some individuals may not be able to obtain online.
 - Enter appropriate information
 - Select "**Return Transcript**" for tax year requested on FAFSA
 - Please be aware that it will take between 5 to 10 days for the IRS to mail
- By Phone: Call 800-908-9946
- By Mail: Complete and submit form 4506-T or 4506T-EZ to the IRS

Be sure to list student name and ID # on all transcripts as the IRS does not print identifying information on the transcript.

❖ Submit a **SIGNED** copy of **appropriate Federal Tax Return including Schedules 1, 2, and 3 if applicable.**

IRS Verification of Non-filing letter (Exceptions)

If you are unable to obtain a non-filing letter due to not having a Social Security Number, Individual Taxpayer Identification Number, or an Employer Identification Number you must submit the following:

A signed and dated statement (by spouse, if married), certifying that the individual(s) does not have a Social Security Number, an Individual Taxpayer Identification Number, or an Employer Identification Number. The statement must list the sources and amounts of earnings, other income and resources that supported the individual(s) for the appropriate year. Also, provide a W-2 for each source of employment income for that year, if applicable.