

Proof of Income for Verification Process 2023-2024

Students selected randomly by the Department of Education or by our office for verification must take the following steps. Income must be verified for students and parents (if dependent).

Proof of income for 2021 can be submitted in one of two different methods, if a tax return is filed:

1. Preferred Method: IRS Data Retrieval Tool

- Login to <https://fafsa.gov> and choose *Make Corrections* from the lower, left-hand side.
- Proceed to the Financial Information tab
- Under 'Did you file an income tax return?' you must select 'Already Completed'
- Respond to the questions that populate. (*NOTE: IRS Retrieval Tool is **not** available for the following filing statuses: Married Filing Separately, Head of Household (if married), or Puerto Rico Tax Return [Required to do Step 2])
 - Applicants (or their parents) who file taxes jointly will have to manually enter their income earned from work, because the new IRS DRT system will not display the data it transfers to the FAFSA.
- If none of the above statuses apply, a *Link to the IRS* box will populate. Follow instructions to retrieve and transfer IRS information back to your FAFSA. These steps will need to be completed for the student and parent (if dependent).
- Once data has been successfully transferred and you are redirected back to the FAFSA, follow through to the end of the application and submit the FAFSA correction.

2. Alternative Method: Signed 2021 Tax Return

In lieu of obtaining an IRS transcript, tax filers may submit a signed paper copy of the 2021 tax return that was used for submission to the IRS. Married couples who filed separately must submit both signed returns. Tax returns may be submitted to the Office of Financial Aid by mail, fax, in person, or scanned and emailed.

IRS Verification of Non-filing 2023-2024

As part of the verification process required by the U.S. Department of Education, parent(s) of dependent students and independent students who did not file a 2021 federal tax return must complete the following steps:

- ❖ Non-tax filers who earned income from work in 2021 must indicate the amount(s) on signed **Verification Worksheet**.
- ❖ Non-tax filers must request an IRS Verification of Non-filing of their 2021 tax return status, free of charge, by completing one of the following steps:
 - 1) **IRS website** – <https://www.irs.gov/individuals/get-transcript>
Using the IRS Get Transcript Service
 - 2) **Paper Request Form – IRS Form 4506-T**
Download IRS Form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
 - Complete lines 1 – 4, following the instructions on page 2 of the form.
 - Line 3: Enter the non-filer’s street address and zip code. Use the address currently on file with the IRS.
 - Line 5: Verification of Non-filing Letter should be mailed directly to non-filer.
 - Line 7: Select the checkbox on the right hand side for Verification of Non-filing.
 - Line 9: Year or period requested field, enter “12/31/2021”.
 - The non-filer must sign and date the form and enter their telephone number.
 - Mail or fax the completed IRS Form 4506-T to the address or fax number provided on page 2 of Form 4506-T.
 - If the 4506-T information is successfully validated, non-tax filers can expect to receive a paper IRS Verification of Non-filing Letter at the address provided on their request within 5 to 10 days.