

How to Provide 2019 Financial Information - Independent

Per Federal Regulations, this information is required for all individuals on the 2021-2022 FAFSA.

W-2's

Copies of all 2019 W-2's are required for all individuals

- All students (and spouses) who worked and earned income for 2019 must provide copies of all 2019 W-2 forms issued to the student/spouse by their employers.
- For those unable to obtain W-2's, you must go to the IRS website (www.irs.gov) and obtain a "2019 Wage and Income Transcript" that will be accepted in lieu of missing W-2's.

-AND-

TAX INFORMATION

(Both the student and the spouse appearing on the FAFSA must provide one of these documents)

1. Update your 2021-2022 FAFSA using the IRS Data Retrieval Tool (DRT)

- Go to FAFSA.gov, log into your FAFSA record, select "Make FAFSA Corrections," and navigate to the *Financial Information* section of the form. Follow the instructions to determine if the student is eligible to use the *IRS Data Retrieval Tool* to transfer 2019 IRS income tax information into the FAFSA.

***NOTE:** *The DRT does not transfer all data elements to the FAFSA, therefore you **may** still be required to provide our office with a copy of your tax return (1040, Schedules 1-3, and Schedules C-F) upon request.*

2. Provide a signed copy of your 2019 (1040) Tax Return

- Per Federal Guidance beginning 1/9/2019 you may submit a **signed copy** of your (2019) 1040 tax return in lieu of obtaining the Tax Return Transcript. The tax return **must be signed by the student**, even if you have filed jointly with your spouse. **This is to include the 1040 (signed), Schedules 1-3, Schedule C, E, and F as applicable.**
 - **NOTE:** *The tax filer must provide an (actual) signature where indicated OR have a valid Tax Preparer's ID listed on your tax return. An electronic (PIN) signature is not acceptable.*

3. Provide a 2019 IRS Tax Return Transcript

- To obtain a 2019 IRS Tax Return Transcript, go to <https://www.irs.gov/Individuals/Get-Transcript> or call 1-800-908-9946. *(You will need your SSN, date of birth, and the address used on your 2019 taxes)*
- Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript" for the tax year ending December 31, 2019.

NON-TAX FILERS

Provide a Non-Filing Letter from the IRS as well as copies of all 2019 W-2's

1. Log onto www.irs.gov/transcript and click on "Request by MAIL" (you may try the "Request Online" option, but most non-filers have difficulty with this option). Select "Return Transcript", and choose the tax year ending December 31, 2019
OR
Download the IRS Form 4506-T at www.irs.gov/pub/irs-pdf/f4506t.pdf and follow the instructions on the form.
2. All non-tax filers must still provide copies of all 2019 W-2's (see instructions above)

Student's Name: _____ SU ID: _____

c. Student Income Information

| Check the boxes below then submit the corresponding documents requested. | Submit the following documents | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|-------------------|------------------------------|-------------------|--|--------|-----|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|---|----|--|
| <input type="checkbox"/> I have filed or will file a 2019 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2019 Tax Return Transcript <input type="checkbox"/> Signed copy of (2019) 1040 tax return <p style="text-align: center;">AND</p> <input type="checkbox"/> Did the student file an amended tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No | - Update your FAFSA using the DRT (Data Retrieval Tool) - Provide a 2019 Tax Return Transcript - Provide a signed copy of your (2019) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, and F as applicable AND all 2019 W-2's If YES , you must submit: 2019 Signed 1040X with all Schedules as filed AND 2019 Tax Return Transcript and all W-2's | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> I did not work and am not required to file a 2019 Federal Income Tax Return. | Non-Filing letter from the IRS (see instructions on first page) | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> I worked but am not required to file a 2019 Federal Income Tax Return. The student was employed in 2019. List below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is provided. Provide copies of all 2019 IRS W-2 forms issued to the student by their employers. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and ID number at the top. | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Employer's Name</th> <th style="width: 25%;">Annual Amount Earned in 2019</th> <th style="width: 25%;">IRS W-2 Provided?</th> </tr> </thead> <tbody> <tr> <td><i>EXAMPLE: Sarah's Wild Designs, Inc.</i></td> <td style="text-align: center;">\$3600</td> <td style="text-align: center;">Yes</td> </tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr> <td style="text-align: right;">Total Amount of Income Earned From Work in 2019</td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table> | | Employer's Name | Annual Amount Earned in 2019 | IRS W-2 Provided? | <i>EXAMPLE: Sarah's Wild Designs, Inc.</i> | \$3600 | Yes | | | | | | | | | | | | | | | | Total Amount of Income Earned From Work in 2019 | \$ | |
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| Total Amount of Income Earned From Work in 2019 | \$ | | | | | | | | | | | | | | | | | | | | | | | | |

***Non-Tax Filers: You must obtain the Non-Filing Letter from the IRS**

- Log onto www.irs.gov/transcript and click on "Get Transcript by MAIL". The individual will be instructed to enter their social security number, date of birth, street address, and zip code. After that is complete, they will be given different options for ordering a transcript. Select "Return Transcript", and choose the tax year ending December 31, 2019.

OR

- Download the IRS Form 4506-T at www.irs.gov/pub/irs-pdf/f4506t.pdf and follow the instructions on the form.

D. Certification and Signature

By signing this form, I certify that all information reported is complete and accurate.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Signature - **required**

Date