



How to Provide 2020 Financial Information – Dependent

Per Federal Regulations, this information is required for all individuals on the 2022 - 2023 FAFSA.

W-2's

Copies of all 2020 W-2's are required for all individuals

- All students and parents who worked and earned income for 2020 must provide copies of all 2020 W-2 forms issued to the student/parent and spouse by their employers.
- For those unable to obtain W-2's, you must go to the IRS website (<https://www.irs.gov/individuals/get-transcript>) and obtain a "2020 Wage and Income Transcript" that will be accepted in lieu of missing W-2's.

-AND-

TAX INFORMATION

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

1. Update your 2022 - 2023 FAFSA using the IRS Data Retrieval Tool (DRT)

- Go to studentaid.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 and parent(s) are eligible to use the *IRS Data Retrieval Tool* to transfer 2020 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 signed tax return (1040, Schedules 1-3, and Schedules C-F) upon request.*

2. Provide a signed copy of your 2020 (1040) Tax Return

- Per Federal Guidance beginning 1/9/2019 you may submit a **signed copy** of your (2020) 1040 tax return in lieu of obtaining the Tax Return Transcript. **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 2020 IRS Tax Return Transcript

- To obtain a 2020 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 2020 taxes)*
- Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript" for the tax year ending December 31, 2020.

NON-TAX FILERS

Provide a Non-Filing Letter from the IRS as well as copies of all 2020 W-2's

1. Log onto <https://www.irs.gov/individuals/get-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, 2020.
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 2020 W-2's (see instructions above)

Student's Name: _____

SU ID: _____

C. STUDENT INCOME INFORMATION

Check the applicable boxes below then submit the corresponding documents requested.	Submit the following documents																					
<input type="checkbox"/> I have filed or will file a 2020 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2020 Tax Return Transcript <input type="checkbox"/> Signed copy of (2020) 1040 tax return <p style="text-align: center;">AND</p> Did the student file an amended (changed) tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No	- Update your FAFSA using the DRT (Data Retrieval Tool) - Provide a 2020 Tax Return Transcript - Provide a signed copy of your (2020) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, and F as applicable AND all 2020 W-2's If YES , you must submit: 2020 Signed 1040X with all Schedules as filed AND 2020 Tax Return Transcript/ Signed 1040 and all W-2's																					
<input type="checkbox"/> I did not work and am not required to file a 2020 Federal Income Tax Return.	No documentation required.																					
<input type="checkbox"/> I worked but am not required to file a 2020 Federal Income Tax Return. The student was employed in 2020. List below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. Provide copies of all 2020 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: 60%;">Employer's Name</th> <th style="width: 20%;">Annual Amount Earned in 2020</th> <th style="width: 20%;">IRS W-2 Provided?</th> </tr> </thead> <tbody> <tr> <td><i>EXAMPLE: Mary's Bakery and Café</i></td> <td style="text-align: center;"><i>\$2,000</i></td> <td style="text-align: center;"><i>Yes</i></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 2020</td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table>		Employer's Name	Annual Amount Earned in 2020	IRS W-2 Provided?	<i>EXAMPLE: Mary's Bakery and Café</i>	<i>\$2,000</i>	<i>Yes</i>													Total Amount of Income Earned From Work in 2020	\$	
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D. PARENT INCOME INFORMATION

Check the applicable boxes below then submit the corresponding documents requested.	Submit the following documents																					
<input type="checkbox"/> I have filed or will file a 2020 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2020 Tax Return Transcript <input type="checkbox"/> Signed copy of (2020) 1040 tax return <p style="text-align: center;">AND</p> Did the parent(s) file an amended (changed) tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No	- Update your FAFSA using the DRT (Data Retrieval Tool) - Provide a 2020 Tax Return Transcript - Provide a signed copy of your (2020) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, and F as applicable AND all 2020 W-2's If YES , you must submit: 2020 Signed 1040X with all Schedules as filed AND 2020 Tax Return Transcript/ Signed 1040 and all W-2's																					
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<input type="checkbox"/> I worked but am not required to file a 2020 Federal Income Tax Return. You must provide a non-filing letter from the IRS.** One or both parents were employed in 2020. List below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. Provide copies of all 2020 IRS W-2 forms issued to the parent(s) 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.																						
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Certification and Signature: Each person signing this worksheet certifies that all of the information reported is complete and accurate.

Student Signature - **required**

Date

Parent Signature - **required**

Date

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