

Instructions: How to Provide Tax Information to Ursuline

Tax Filers: If you filed a federal income tax return, you must provide tax information directly from the IRS. You may do so using either **Option 1** (if you qualify) or **Option 2** listed below.

Option #1: Electronically transfer data using the IRS Data Retrieval Tool in the FAFSA (preferred method)

1. Sign in at studentaid.gov
2. Use the '**Apply for Aid**' link at the top of the page and choose '**Complete the FAFSA Form**'
3. **Log in as a Returning User** to make corrections
4. Choose the **Financial Information** tab to access parent and student financial information sections. *(you will need to complete the IRS Data Retrieval under Student Financial Information and, if Dependent, Parent Financial Information.)*
5. The first question regarding tax filing status must be changed to **Already Completed**.
6. Review the boxes to see if any of the following circumstances apply; if not, select **None of the Above**.
 - You **cannot** use the IRS Data Retrieval Tool if any of the following apply:
 - Parents/student is married, but filed separate tax returns
 - Filed an amended tax return
 - Filed a Puerto Rican or foreign tax return
7. You will be presented with the option to link to the IRS.
 - If prompted, enter your FSA Username and Password. *(If you logged in to the FAFSA using your FSA Username and Password you will not be prompted to do it again.)*
 - Click **Link to IRS**
 - You will now be taken out of the FAFSA and into the **IRS website**
 - Fill in your address information (this must match exactly the address as it was used to file your 2018 tax return)
 - Select **Transfer My Tax Information into the FAFSA**
 - Next, click **Transfer Now** to complete the transfer of information.
8. Once back in the FAFSA, go to the bottom of the screen and click **Save**, then click **Next**
9. **IMPORTANT:** Once all information is transferred into the FAFSA, **SAVE AND SUBMIT** YOUR FAFSA. Make sure you receive a confirmation page of submission.

Option #2: Order a Tax Return Transcript from the IRS

You must use this option if you do not qualify to use Option 1 above, or if you do not wish to use Option 1. You must also use this option if the Financial Aid Office has specifically indicated to you that a tax return transcript is required.

If parents filed separate tax returns, you will need each parent's individual IRS Tax Return Transcript.

1. Go to www.irs.gov
2. Click on "**Get Your Tax Record**"
3. Be sure to order the **IRS Tax Return Transcript**, **not** the IRS Tax Account Transcript
4. To get a transcript **ONLINE**, you will need:
 - **Social Security Number, Date of Birth, filing status, and mailing address** (from latest tax return)
 - Access to your email account
 - Your **personal account number from:** a credit card, mortgage, home equity loan, home equity line of credit or car loan
 - A **mobile phone number** with your name on the account
5. To order **BY MAIL**, you will need:
 - **Social Security Number, Date of Birth, and mailing address from latest tax return**
6. It takes two to three weeks for IRS income information to be available for electronic IRS tax return filers, and eight to eleven weeks for paper IRS tax return filers.

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Non-Tax Filers: If you **did not** file a federal income tax return, you must provide verification of non-filing directly from the IRS and submit W-2(s) You must do so using **Option 3** listed below.

Option #3: Provide Verification on Non-filing from IRS and submit W-2(s).

Non-Tax Filers who earned income must use **Option #3** to request a Verification of Non-filing Letter from the IRS, free of charge, as well as submit copies of any/all W-2s to verify income earned.

Paper Request

1. Download the **IRS Form 4506T** at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. (Or available in Student Services)
2. Print form off and complete lines 1-4. On **line 7, check the box to indicate you would like to receive a Verification of Non-filing**, proof that you did not file a return for the year
3. On line 9 indicate the ending date on the year or period. For 19-20 verification the date should be 12/31/2019.
4. Mail or fax the form to the correct location based on where you live. (Use 2nd Page of 45067T to determine this address or fax number).
5. The **Verification Letter of Non-filing** will be mailed to you within 10 business days. Once you receive it, forward to Ursuline College - Financial Aid Office.

Other Special Circumstances:

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2018 must provide:

- A 2018 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all income and tax information required to be verified; **and**
- A signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

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