



## How to Provide 2021 Financial Information – Dependent

*Per Federal Regulations, this information is required for all individuals on the 2023-2024 FAFSA.*

### W-2's

#### **Copies of all 2021 W-2's are required for all individuals**

- All students and parents who worked and earned income for 2021 must provide copies of all 2021 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 ([www.irs.gov](http://www.irs.gov)) and obtain a "2021 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 2023-2024 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 and parent(s) are eligible to use the *IRS Data Retrieval Tool* to transfer 2021 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, E, and/or F) upon request.*

#### **2. Provide a signed copy of your 2021 (1040) Tax Return**

- Per Federal Guidance beginning 1/9/2021 you may submit a **signed copy** of your (2021) 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/or 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 2021 IRS Tax Return Transcript**

- To obtain a 2021 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 2018 taxes)*
- Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript" for the tax year ending December 31, 2021.

### **NON-TAX FILERS**

#### **Provide a Non-Filing Letter from the IRS as well as copies of all 2021 W-2's**

1. Log onto [www.irs.gov/transcript](http://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, 2021  
**OR**  
Download the IRS Form 4506-T at [www.irs.gov/pub/irs-pdf/f4506t.pdf](http://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 2021 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 2021 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2021 Tax Return Transcript <input type="checkbox"/> <b>Signed</b> copy of (2021) 1040 tax return <p style="text-align: center;"><b>AND</b></p> Did the student file an <b>amended (changed)</b> tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No	- Update your FAFSA using the DRT (Data Retrieval Tool) - Provide a 2021 Tax Return Transcript - Provide a <b>signed copy</b> of your (2021) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, and/or F as applicable <b>AND</b> all 2021 W-2's  If <b>YES</b> , you must submit: 2021 Signed 1040X with all Schedules as filed <b>AND</b> 2021 Tax Return Transcript/ <b>Signed</b> 1040 and all W-2's																					
<input type="checkbox"/> I did not work and am not required to file a 2021 Federal Income Tax Return.	No documentation required.																					
<input type="checkbox"/> I worked but am not required to file a 2021 Federal Income Tax Return.  The student was employed in 2021. List below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. Provide copies of all 2021 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.																						
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**D. PARENT INCOME INFORMATION**

Check the applicable boxes below then submit the corresponding documents requested.	Submit the following documents																					
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<input type="checkbox"/> I worked but am not required to file a 2021 Federal Income Tax Return. You must provide a non-filing letter from the IRS.**  One or both parents were employed in 2021. List below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. Provide copies of all 2021 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.**