



How to Provide Financial Information - Independent

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

W-2's

Copies of all 2022 W-2's are required for all individuals where the FA-DDX was unsuccessful OR you are a non-filer

- All students (and their spouses) who worked and earned income for 2022 who were either non-filers OR were unsuccessful using the FA-DDX must provide copies of all 2022 W-2 forms issued to the student/parent and the parent's spouse by their employers.
- For those unable to obtain W-2's, you must go to the IRS website (<https://irs.gov/individuals/get-transcript/>) and obtain a "2022 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 2024-2025 FAFSA using the IRS Data Retrieval Tool (DRT)

- Go to studentaid.gov, log into your FAFSA record, select "Make FAFSA Corrections;" make sure that you and your spouse's identification information is correct and that all contributors have granted consent. Please note if the FA-DDX did not work for you, you will be prompted to enter tax information manually and will need to provide another method of tax information to our office for verification.

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

2. Provide a signed copy of your 2022 (1040) Tax Return

- Per Federal Guidance beginning 1/9/2022 you may submit a **signed copy** of your federal (2022) 1040 tax return in lieu of obtaining the Tax Return Transcript. **This is to include the federal 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 and EIN listed on your tax return. An electronic (PIN) signature is not acceptable.

3. Provide a 2022 IRS Tax Return Transcript

- To obtain a 2022 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 2022 taxes)
- Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript" for the tax year ending December 31, 2022.

NON-TAX FILERS

If the FA-DDX Did Not Transmit Tax Data, Provide a Non-Filing Letter from the IRS as well as copies of all 2022 W-2's

1. Log onto www.irs.gov/transcript and click on "Request by MAIL" (you may try the "Request Online" option, however, some non-filers have difficulty with this option). Select "Return Transcript", and choose the tax year ending December 31, 2022

OR

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

1. All non-tax filers must still provide copies of all 2022 W-2's and provide us information on all sources of income/financial support (see instructions above for W-2 request steps)

