



# Instructions to Obtain Acceptable Verification of Tax Information

## Tax Return Filers choose ONE of the following:

- **IRS Data Retrieval Tool (DRT):**

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of FAFSA on the Web. Go to **FAFSA.gov**. Log in to the student's FAFSA record with student FSA ID and password.

Select the correct aid year, then select "**Make FAFSA Corrections**", the second bullet point under "You can also:". Click on the **Financial Information** tab. Answer the questions to determine if you are eligible to use the IRS DRT (Parents: If you are able to use the DRT, select which parent you are from the dropdown box. Enter your parent FSA ID and password). Click on "LINK TO IRS". This will bring you to the IRS website. Enter the address on file with the IRS (normally this will be the address used when the 2021 IRS tax return was filed), your filing status and click "submit" at the bottom of the page. This will take you to your tax information. Check the box that says "**Transfer My Tax Information into the FAFSA**" and select "**Transfer Now**". You will be redirected back to the FAFSA. Scroll down the page clicking "Next" at the bottom. Once you get to the "Sign & Submit" tab, you will need to **sign** (using your FSA ID) and **submit** the corrected FAFSA.

- **IRS Tax Return Transcript:**

Request a free Tax Return Transcript for tax year 2021, by contacting the IRS at 1-800-908-9946 or [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript)

- **IRS Federal 1040 Tax Return (signed):**

You may provide a **signed** copy of your 2021 Federal 1040 Tax Return form and all submitted tax schedules (1-6). If completed by a tax preparer or tax professional, the Federal 1040 Tax Return form must include name and address of the preparer on the return, as well as the tax preparer's Social Security Number (SSN), Employer Identification Number (EIN), or Preparer Tax Identification Number (PTIN). Copies can be **sent via secure fax at: (920)403-3062, secure document upload at [snc.edu/go/upload](http://snc.edu/go/upload), or by mail to St. Norbert College, Office of Financial Aid, 100 Grant Street, De Pere, WI 54115**. Please add student's name and/or ID number before submitting.

## Non-Tax Filers:

### **Verification of Non-Filing Letter**

You and/or your spouse are required to provide Verification of Non-Filing Letter from IRS that indicates a 2021 IRS income tax return was not filed with the IRS. You can request this by contacting the IRS at 1-800-908-9946 or [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript). Please attach letter(s) from the IRS to this worksheet.

## Important Notes:

- If you and/or your spouse filed an amended IRS income tax return for tax year 2021, you must provide:
  - A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS as well as either
    - IRS Data Retrieval Information on the FAFSA with all information from the original tax return **OR**
    - A **2021 [IRS Tax Return Transcript](http://www.irs.gov/Individuals/Get-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 of the income and tax information required to be verified, **OR**
    - Signed copy of a 1040 tax return.
- If you are married, and filed separate 2021 tax returns, 2021 IRS tax return transcripts or signed copies of the Federal 1040 Tax Return for 2021 must be submitted for you and your spouse.