

D. Parent(s) Income and Tax Information

Please check the box that applies to your parent(s)' earned income and tax information. Please note: Some fields will require additional action from you. If you need assistance, please see page 4 for instructions and tips or contact the Office of Financial Aid.

IMPORTANT NOTE: The instructions below apply to each parent, including step parents, in the household. Notify the Financial Aid Office if the parents filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

My parent(s) have filed a 2021 IRS income tax return and is/are providing their tax information by:

Using the IRS Data Retrieval Tool in my FAFSA on the web to transfer 2021 IRS income tax return information

Have not yet used the IRS Data Retrieval Tool in my FAFSA, but will use the tool to transfer 2021 IRS income Tax return

Providing a signed copy of their 2021 Federal Income Tax Return and any applicable schedules, i.e., Schedules 1, 2, 3, and Schedules A, B, C and K-1 **or** a copy of their 2020 IRS Tax Return Transcript obtained from the IRS (obtained from www.irs.gov)

-OR-

My parent(s) is/are required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for the 2021 tax year. They must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2021;
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2021 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.

-OR-

My parent(s) filed an amended IRS income tax return for tax year 2021 and is/are providing a signed copy of their 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS in addition to one of the following:

- Using the IRS Data Retrieval Tool in my FAFSA on the web to transfer 2021 IRS income tax return information
- Providing their 2021 IRS Tax Transcript obtained from the IRS (obtained from www.irs.gov)
- Providing a signed copy of their 2021 Federal Income Tax Return, and all schedules filed

-OR-

My parent(s) was the victim of IRS tax-returned identity theft and is/are providing:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2021 income tax return and applicable schedules the individual filed with the IRS; 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.

-OR-

My parent(s) **will not file and are not required** to file a 2021 IRS income tax return **and** were not employed had no earnings from work in 2021. My parent(s) will provide a Verification of Non-Filing letter from the IRS (obtained from www.irs.gov)

-OR-

One or both parents **will not file and are not required** to file a 2021 IRS income tax. One or both parent (was employed in 2021 and

have listed below the names of all employers, the amount earned for each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. My parent(s) will provide a Verification of Non-Filing letter from the IRS, copies of all W-2(s) from 2020, and complete the chart below **even if their employer did not issue a W-2:**

Employer's Name	IRS W-2 or and Equivalent Document Provided?	Annual Amount Earned in 2021
XYZ Shipping (Example)	Yes	\$7,500

Student's Last Name

Student's First Name

MI

Student ID #

E. Student Income and Tax Information

Please check the box that applies to you (the student) and your spouse (if applicable). Please note: Some fields will require additional action from you. If you need additional assistance, please see page 4 for instructions and tips or contact the Office of Financial Aid.

I, the student (and spouse, if applicable) filed a 2021 IRS income tax return and am providing my tax information by:

Using the IRS Data Retrieval Tool in my FAFSA on the web to transfer 2021 IRS income tax return information

-OR-

Have not yet used the IRS Data Retrieval Tool in my FAFSA, but will use the tool to transfer 2021 IRS income tax return

-OR-

Providing a signed copy of my 2021 IRS Tax Return and any applicable schedules, i.e., Schedules 1, 2, 3, and Schedules A, B, C and K-1 or a 2021 Tax Return Transcript obtained from the IRS (at www.irs.gov)

-OR-

I, the student, **will not file and am not required** to file a 2021 IRS income tax return and was not employed and had no income earned from work in 2021

-OR-

I, the student, will not file and not required to file a 2021 IRS income tax return. I was employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021 and whether an IRS W-2 form or an equivalent document is provided. Please complete the chart below and report your employer and earnings **even if your employer did not issue you a W-2.**

Employer's Name	IRS W-2 or and Equivalent Document Provided?	Annual Amount Earned in 2021
<i>ABC Shipping (Example)</i>	Yes	\$2,100

F. Student and Parent Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fine, jailed, or both.**

Student's Signature (Required)

Date

Parent's Signature (Required)

Date

Instructions Page

Please fill out page 1, 2, and 3 to the best of your ability. This page does not need to be submitted to the Office of Financial Aid with pages 1, 2 and 3. If you have any questions, please feel free to contact the Office of Financial Aid at faoffice@beloit.edu or call 608-363-2663.

How to use the IRS Data Retrieval Tool (DRT) to import tax data into the FAFSA

Please note: If your parents filed separate 2020 IRS Income tax returns, the IRS DRT cannot be used and the 2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules must be provided for each.

1. Go to www.studentaid.gov, click the white "Login" button and log in using the student's FSA ID and password.
2. Click "Edit FAFSA form" on the homepage and create a Save Key.
3. Click on the "Parent Financials" tab.
4. For the question "Have your parents completed their IRS income tax return" choose "Already Completed."
5. In the IRS Data Retrieval Tool box click proceed to the IRS.
6. Select answer to "which parent are you," enter parent's FSA ID and click "Link to IRS."
7. Click "OK" to "Leaving FAFSA on the Web."
8. Click "OK" to the pop-up message "This Gov't System is for Authorized Use Only."
9. Enter information request (Filing Status, Address, etc.) and click "Submit." If the transfer is successful, you may proceed to step 10. If any of the answers you reported does not match the IRS records, the search for the tax data will not be successful. Please be sure to include correct zip codes, apartment numbers, PO boxes, etc. The address must match the address reported on the most recent tax return and the parent SSNs must be correct.
10. Click "Transfer my tax information into the FAFSA" on the left of the page and click "Transfer Now" on the right.
11. Repeat this process for student if the student has filed taxes- If not, click "Next" at the bottom of the Financial Information Page.
12. You will be directed back to the FAFSA webpage. At the "List of Changes," review, then scroll to the bottom and click "Next."
13. Click "Sign and Submit" and follow instructions to submit the changes.
14. You will receive a confirmation number and a confirmation email.

How to request an IRS Tax Return Transcript

There are four different ways to request a tax return transcript:

- 1) **ONLINE:** Go to IRS.gov, click on "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two step authentication. If you are unable to create an account online, see #2.
- 2) **MAIL:** Go to IRS.gov, click "Get Your Tax Record" and then click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 3) **Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.**
- 4) **PAPER:** IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

See instructions on the next page for requesting a Verification of Non-Filing Letter

Student's Last Name

Student's First Name

MI

Student ID #

How to request a Verification of Non-Filing Letter

The Verification of Non-Filing Letter provides proof that the IRS has no record of a filed Form 1040 for the year you requested. It doesn't indicate whether you were required to file a return for that year.

There are two ways to request a Verification of Non-Filing Letter:

- 1) **ONLINE:** (For individuals who have filed taxes in prior years only. If you have never filed a tax return before, please see #2) Go to IRS.gov and click on Get Your Tax Record. Click "Get Transcript ONLINE." If at any point you cannot validate your identity, please see #2.
- 2) **Paper Request:** Download the IRS Form 4506-T at IRS.gov. Complete the form and submit to the IRS using the address or fax number provided on page 2 of the form. You can expect to receive the Verification of Non-Filing via mail within 10 days.

Having issues with requesting these items from the IRS?

The IRS.gov help desk can be reached at 800-829-1040.