



2022-2023 Acceptable Tax Documents

Financial Assistance
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Evansville, IN 47712
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IRS Data Retrieval Tool *(This option will streamline and expedite the processing of your financial aid application.)*

1. Log in to your current FAFSA form at fafsa.gov.
2. In the finances section of the online form, you will see a "Link to IRS" button if you are eligible to use the IRS DRT.
3. Click the "Link to IRS" button and log in with your FSA ID to be transferred to the IRS to retrieve your info.
4. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the "Submit" button.
5. Check the "Transfer My Tax Information into the FAFSA form" box, and click the "Transfer Now" button.
6. On the "Sign & Submit" page, read the certification statement, and check the box indicating that you agree with the statement. Then select "Submit My FAFSA" at the bottom of the page.

Although the IRS Data Retrieval Tool is the preferred method for submitting tax information, the Department of Education is currently allowing institutions to accept personal copies of federal tax returns (1040, 1040A or 1040EZ along with Schedule 1, 2, and 3) as long as they are signed.

Special situations that require alternative or additional documentation:

- Students/Parents who are married, but filed separate 2020 federal tax returns:
 - Submit signed copies of the 2020 Federal Tax Returns (**1040, 1040A or 1040EZ along with Schedule 1, 2, and 3**) for parent and spouse (if dependent) or student and spouse (if independent).
- Students/Parents whose marital status has changed after filing the 2020 Federal Tax Return:
 - If separated or divorced, submit a signed copy of the 2020 Federal Tax Return (**1040, 1040A or 1040EZ along with Schedule 1, 2, and 3**) AND copies of ALL 2020 W-2(s) and 1099(s) for parent and ex-spouse (if dependent) or student and ex-spouse (if independent).
 - If married/re-married, submit signed copies of the 2020 Federal Tax Returns (**1040, 1040A or 1040EZ along with Schedule 1, 2, and 3**) for parent and spouse (if dependent) or student and spouse (if independent).
- Students/Parents who did not and will not file a 2020 Federal Tax Return:
 - Submit copies of all 2020 W-2s.
 - Independent students and parents of dependent students are required to submit Verification of Non-Filing from the IRS dated on or after October 1, 2021 that indicates a 2020 IRS income tax return was not filed with the IRS.
 - Dependent students may be required to submit Verification of Non-Filing from the IRS if conflicting information exists.
- Students/Parents who filed a 2020 foreign tax return:
 - Submit a signed copy of the 2020 foreign tax return.
 - Contact the Financial Assistance Office for further guidance.
- Students/Parents who were victims of tax administration identity theft:

Tax filers who believe they are victims of identity theft should call the Identity Protection Specialized Unit (IPSU) toll-free number at 1-800-908-4490 or visit the IRS identity theft website at irs.gov.

 - Submit a copy of the Tax Return Database View (TRDBV) transcript obtained directly from the IRS; AND
 - A statement signed and dated by the tax filer indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.
- Students/Parents who were granted a filing extension (beyond the October 15 automatic extension) by the IRS:
 - Contact the Financial Assistance Office for further guidance.

Verification of Non-Filing

The Verification of Non-Filing Letter is proof from the IRS that you did not file a return. This documentation may be requested by sending a completed IRS 4506-T to the IRS. The 4506-T may be downloaded and printed online at www.irs.gov/pub/irs-pdf/f4506t.pdf.

IRS Tax Return Transcript

In some circumstances it may be necessary for you to submit a 2020 IRS Tax Return Transcript. To request the IRS Tax Return Transcript, visit the www.irs.gov/individuals/get-transcript. Pay attention to the year you are requesting. It is important to request the IRS Tax Return Transcript not the IRS Tax Account Transcript. The Account Transcript does not contain the necessary information to complete verification.

Wage and Income Transcript

In some circumstances it may be necessary for you to submit a 2020 Wage and Income Transcript. The Wage and Income Transcript may be obtained via the Get Transcript Online option at www.irs.gov/individuals/get-transcript or by sending a completed IRS 4506-T to the IRS. The 4506-T may be downloaded and printed online at www.irs.gov/pub/irs-pdf/f4506t.pdf.

Write the student's name and USI student ID number on the top of all tax documents submitted to the Financial Assistance Office.