

Notes:

- The IRS Data Retrieval is the preferred method to verify tax information because it is the fastest, easiest and most **secure** method available.
- You do **NOT** need to complete all three methods. You can choose whether to complete the IRS Data Retrieval, to request a Tax Return Transcript, or send a signed copy of the 2020 Tax Return 1040 with all schedules attached. Again the preferred method is the IRS Data Retrieval.
- Nontax filers and tax filers who received an extension but still have not filed their income tax return must provide confirmation of nonfiling dated on or after Oct. 1, 2022. A confirmation of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

How to Complete the IRS Data Retrieval

1. Log into FAFSA at www.studentaid.gov/fafsa
2. Select "Login"
3. Enter FSA ID username and password for student and select "Next"
 - If a FSA ID has not been created, please select create an FSA ID username and password
4. Select "Make FAFSA Correction" (bottom left) and select "Next"
5. Enter Save Key or create a Save Key and select "Next"
6. Select the "Financial Information" section from the menu bar at the top of the page
7. You will be asked if you have completed your 2020 IRS Income Tax Return
 - You must be able to select "Already Completed" to continue
8. What income tax return did you file for 2020, For 2020 what was your filing status on your tax return.
9. Enter the Parent 1 or Parent 2 FSA ID username and password and select "Link to the IRS"
 - You will receive a prompt stating that you are now leaving FAFSA on the Web
10. Select "OK"
 - You will receive a prompt stating that you are now using and entering a Government website
11. Select "OK"

12. Review the prefilled information and make sure that the first name, last name, social security number and date of birth are correct
 - Select the appropriate filing status
 - Enter the address EXACTLY as it is shown on your tax return (word for word, abbreviation for abbreviation, case sensitive)
13. Select "Submit"
14. You will now see a summary page of the information that will be transferred into the FAFSA
 - Scroll to the bottom of the page
 - Check the box next to "Transfer Data to FAFSA" option
 - Select "Transfer Now"
15. You will receive notification that the data has been successfully transferred and will be directed back to the FAFSA
16. If necessary, complete the same steps to transfer the student tax data
17. Select the "Sign and Submit" section from the menu bar at the top of the page
 - Sign the FAFSA with the appropriate FSA ID and submit the correction for processing

How to Order a Tax Return Transcript/Nonfiling Letter

1. Online at www.irs.gov
 - Select "Get Tax Records"
 - Select "Get Transcript by Mail" or select online
 - Enter all fields per filed IRS Tax Form
 - Select Type of Transcript
Select Return Transcript
Select 2020 tax year
Note: If a joint return, use primary SSN on return.
2. Call 800.908.9946
 - Enter information as prompted
 - Make sure to order a "Return Transcript" and NOT an "Account Transcript"
3. IRS Form 4506T-EZ – must file 4506T for nonfiling confirmation
 - Form can be found at www.irs.gov by searching 4506T-EZ
 - Mail to the appropriate IRS office by following the instructions on the second page of the form
 - **Enter Concordia ID on line 5b, not SSN**

NOTE: Record of Account Transcript or Account Transcript is not acceptable for the verification process according to Federal guidelines. You must submit a Tax Return Transcript.

Also Acceptable

Signed copy of 2020 Tax Return 1040 with **ALL** schedules attached