



## C. Tax Forms and Income Information

Did you or your spouse (if applicable) file a 2018 IRS Tax Return?

Check the applicable box in each column below.

Student	Spouse
<input type="checkbox"/> Yes – Complete Sections D & F	<input type="checkbox"/> Yes – Complete Sections D & F
<input type="checkbox"/> No – Complete Sections E & F	<input type="checkbox"/> No – Complete Sections E & F

## D. Did you or your spouse (if applicable) use the IRS Data Retrieval Tool?

Check the applicable box in each column below.

Student	Spouse
<input type="checkbox"/> Used IRS Data Retrieval Tool in the FAFSA to transfer 2018 IRS income <sup>1</sup> .	<input type="checkbox"/> Used IRS Data Retrieval Tool in the FAFSA to transfer 2018 IRS income <sup>1</sup> .
<input type="checkbox"/> Ineligible or chooses not to use the IRS Data Retrieval Tool and will provide the school either: <ul style="list-style-type: none"> <li>• 2018 Tax Return Transcript<sup>2</sup></li> </ul> or <ul style="list-style-type: none"> <li>• 2018 Signed Federal Tax Return. Also provide Schedule 1, 2, &amp; 3 of 2018 tax return if filed.</li> </ul>	<input type="checkbox"/> Ineligible or chooses not to use the IRS Data Retrieval Tool and will provide the school either: <ul style="list-style-type: none"> <li>• 2018 Tax Return Transcript<sup>2</sup></li> </ul> or <ul style="list-style-type: none"> <li>• 2018 Signed Federal Tax Return. Also provide Schedule 1, 2, &amp; 3 of 2018 tax return if filed.</li> </ul>

### <sup>1</sup>IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows applicants who have already filed their federal income tax returns to populate the answers to some questions on the Free Application for Federal Student Aid (FAFSA) by transferring data from their federal income tax returns direct from the IRS.

### <sup>2</sup>Ineligible to use the IRS Data Retrieval Tool

Most students are eligible to use the IRS Data Retrieval Tool if they have already filed their taxes. However, there are a few scenarios in which students are ineligible to use the IRS Data Retrieval Tool, such as:

- The student is married, and either the student or their spouse filed as Married Filing Separately.
- The student is married, and either the student or their spouse filed as Head of Household.
- The student or spouse filed a Puerto Rican or foreign tax return.

Any student/spouse ineligible to use the IRS Data Retrieval Tool can either request their tax return transcripts from the IRS or provide a signed copy of their 2018 federal tax return. To obtain a 2018 Tax Return Transcript go to [www.irs.gov](http://www.irs.gov) and click on the “Get a tax transcript” link. You will have the option of either logging in and printing your tax return transcript immediately, or you can request the tax return transcript be mailed to the mailing address on your latest tax return. You can also request a tax return transcript by completing Form 4506T-EZ.

### Amended Tax Returns

If you filed a Form 1040X amended tax return for 2018, we will need a signed copy of the Form 1040X that was filed with the IRS before verification can be completed.

**Do not complete Section E if you filed a 2018 IRS Tax Return**

**E. Non-filer's Income Information**

**Will not file** and not required to file a 2018 U.S. Income Tax Return based on income thresholds established by the IRS or foreign taxing authority. **If you did not file, you must** complete the section **AND** submit copies of all 2018 W-2's. **If you had no earnings enter a zero in the yearly amount field below.** All non-filers must also submit a *Verification of Nonfiling from IRS for the 2018 tax year*. A verification of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7.

<b>STUDENT</b> Employers Name (Attach copies of W-2's)	2018 Yearly Amount Earned	<b>SPOUSE</b> Employers Name (Attach copies of W-2's)	2018 Yearly Amount Earned
	\$		\$
	\$		\$
	\$		\$

<b>Student</b>	<b>Spouse</b>
<input type="checkbox"/> Check here if the Verification of Nonfiling from the IRS is included with this worksheet	<input type="checkbox"/> Check here if the Verification of Nonfiling from the IRS is included with this worksheet
<input type="checkbox"/> Check here if the Verification of Nonfiling from the IRS will be submitted later. <i>(Verification cannot be completed until the Verification of Nonfiling has been submitted.)</i>	<input type="checkbox"/> Check here if the Verification of Nonfiling from the IRS will be submitted later. <i>(Verification cannot be completed until the Verification of Nonfiling has been submitted.)</i>

**F. Sign This Form:**

I certify that the information reported on this form is complete and correct. I understand that if I purposely give false or misleading information, I may be fined, sentenced to prison, or both.

\_\_\_\_\_  
Signature of student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse (Optional)

\_\_\_\_\_  
Date

**Digital and electronic signatures are not acceptable.**