



## Tax Information Sheet: 2020-21 Verification Requirement

Per federal regulations tax documents are required for **both tax filers and non-tax filers**, view below to see what documents you and your parents are required to provide. *Please note that tax filers have 3 options available.*

### Tax Filers: Option A

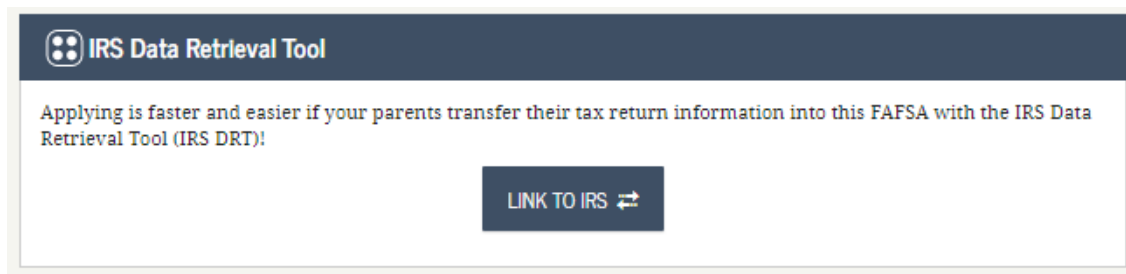
#### Data Retrieval Tool (DRT) within FAFSA

Log into your FAFSA to link both the parent and student IRS income tax information:

1. Navigate to the **“parent financials”** section (and then the “student financials” after)



2. Click on **“link to IRS”**; follow the prompts to link the taxes back to the FAFSA



3. Once both parent and student income is linked, make sure to **save, sign, and submit!**

### Tax Filers: Option B

#### 2018 IRS Tax Return Transcript

*There are 3 options to obtain the 2018 tax return transcript from the IRS.*

1. **Online:** <https://www.irs.gov/individuals/get-transcript>
  - a. Receive online or by mail the 2018 Tax Return Transcript
2. **Phone:** 1-800-908-9946
  - a. Request via phone for the 2018 Tax Return Transcript (to be mailed)
3. **File Form 4506-T**
  - a. Form is available at <https://www.irs.gov/>

## Tax Filers: Option C

### Copy of 2018 1040 Form (with Schedules 1, 2, & 3)

*\*MUST BE HAND SIGNED AND DATED!*

<b>Sign Here</b> Joint return? See instructions: Keep a copy for your records.	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than the taxpayer) is based on all information of which preparer has any knowledge.	<input type="checkbox"/>	<input type="checkbox"/>
	Your signature	Date	Your occupation
	Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation
			If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
			If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

## Non Tax Filers

### File Form 4506-T

- Form is available at [WWW.IRS.Gov](http://WWW.IRS.Gov).
- Check **box #7**: Verification of Non-filing!
- Be sure to fill out entire form and Mail or Fax. (Instructions on Form)

\*NOTE: This requirement is for independent students and parents of dependent students



**If you have tried to request this form and have not received any letters from the IRS, please contact the Financial Aid Office**

## Unusual Filing Circumstances

Please contact our office to find out what is needed if you have an unusual filing circumstance, such as:

- Filed an amended IRS income tax return
- Granted filing extension by the IRS
- Victim of IRS identity theft
- Filed a non-IRS income tax return

→ **UPLOAD YOUR DOCUMENTS TO ALMA COLLEGE:** [alma.edu/fadocupload](http://alma.edu/fadocupload)



**IMPORTANT DOCUMENT NOTE:** *If you are applying for aid at other schools, please make a copy of your tax transcript for your records before you submit it to a school.*

Not sure if you are required to file taxes? Visit <http://www.irs.gov/uac/Do-I-Need-to-File-a-Tax-Return>