



**Office of Financial Aid**

50 Acacia Avenue, San Rafael, CA 94901-2298

**Section B**

**2021 Tax & Income Information**

## **Instructions for Providing Tax Information**

### **Instructions for using the IRS Data Retrieval Tool (DRT) in FAFSA**

1. Login to the student's FAFSA with the student's FSA ID.
2. In the Student Financial Information Section, complete the questions about whether taxes have been filed, the filing status, and whether a Puerto Rican/foreign tax return were filed for 2021.
3. If you are eligible to use the DRT, a "LINK TO IRS" button should appear. Click it.
4. On the next page, click on the "PROCEED TO IRS SITE" button.
5. Your name and information should appear on the IRS site. Enter your information and address **exactly** as it appears on your 2021 Federal Income Tax Return. Click submit.
6. You will be taken to a page that confirms which items will be transferred from the IRS to the FAFSA. Under the "Transfer My Tax Information into FAFSA" heading, check the box to confirm the transfer of the data and click on the "Transfer Now" button. You will be taken back to the FAFSA.
7. Complete, sign, and submit the remaining portions of the FAFSA.

**Note:** Individuals filing as Married Filing Separately are not eligible to use the IRS DRT and must provide the Tax Return Transcripts (see instructions below) or signed copies of the 2021 income tax return and all applicable schedules for each individual.

### **Instructions for requesting the Tax Return Transcript or Verification of Non-Filing**

1. Go to [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript)
2. Select either "Get Transcript Online" to download most transcripts (requires IRS account) or "Get Transcript by Mail" to request a transcript to be mailed (Tax Return Transcript only)
3. Follow instructions for each method
4. Download or request the needed items
  - a. The Tax Return Transcript will be listed as the Return Transcript for tax filers.
  - b. Verification of Non-Filing Letter will also be listed as Return Transcript for non-tax filers.
  - c. Note: The Verification of Non-Filing Form may also be requested by filing Form 4506-T from the IRS.

### **Unusual Tax Filing Circumstances**

In some cases, you may not be able to submit a Tax Return Transcript or use the IRS DRT in FAFSA to provide your tax information. Please refer to the situations below for additional information.

### **Individuals Granted a Filing Extension by the IRS**

An individual who is 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 tax year 2021, must provide the following items:

- Copy of IRS Form 4868 that was filed with the IRS for tax year 2021
- 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 (see instructio

## **Individuals who filed an Amended Return**

An individual who amended a U.S. Income Tax Return for tax year 2021 needs to provide the following documents: