

C. **Independent Student's Income Information to Be Verified** - The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2020 or had a change in marital status after the end of the 2020 tax year on December 31, 2020. **Check the box that applies:**

- I, the student, will not file and am not required to file a 2020 income tax return with the IRS, **AND** I understand that I must **ALSO** Return an IRS Verification of Non-Filing Letter complete and return a **2022-2023 Student Non-Filer Form**.
- I, the student, have filed a 2020 income tax return but have **ALSO** filed, or will file, an **AMENDED** 2020 IRS tax return, and I understand I must provide 1.) a signed copy of the original 2020 IRS income tax return that was filed with the IRS or a **2020 IRS Tax Return Transcript** for the 2020 tax year; and 2.) a signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS
- I, the student, have filed a 2020 income tax return and have used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2020 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- I, the student, have not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2020 IRS income information into the student's FAFSA once the student has filed a 2020 IRS tax return. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, it can still be used: go to [FAFSA.gov](https://fafsa.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2020 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- I, the student have filed a 2020 income tax return but am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and will submit to the school a **2020 IRS tax return transcript** (a photocopy of the income tax return is not acceptable). *To obtain a free IRS tax return transcript, go to www.irs.gov and click on the "Get Transcript of Your Tax Records" link under "Tools." If you create an account before proceeding to the additional steps of requesting a tax transcript, you should be able to download and print your transcript immediately, or request the transcript be mailed to your address on record. Alternatively, you may call 1-800-908-9946, or contact your local IRS office to see if you may pick up a copy. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need the Social Security Number (or the IRS individual taxpayer identification number) and date of birth of the first person listed on the 2020 IRS income tax return, and the address on file with the IRS (normally this will be the address used when the 2020 tax return was filed). Adequate time from the date of filing your tax return (up to three weeks for IRS electronic filers, and up to eleven weeks for paper IRS filers) is necessary prior to requesting an IRS tax return transcript. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.*

If the student and spouse filed separate 2020 IRS income tax returns, 2020 IRS Tax Return Transcripts must be provided for both.

- Check here if a 2020 IRS Tax Return Transcript is provided
- Check here if a 2020 IRS Tax Return Transcript will be provided later.

Sections C Additional Information:

Verification of 2020 Income Information for Individuals with Unusual Circumstances

Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who is not able to obtain a **2020 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2020 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

An individual filed or will file a 2020 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2020 income tax return(s).

D. Certifications and Signatures

Each person signing this worksheet certifies that all of the information reported on this worksheet is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

You should make a copy of this worksheet for your records.

Print Student's Name

Final four digits of Student's Social Security Number

Student's Signature

Date

Spouse's Signature (Optional)

Date

Upload this form to: <https://finaidforms.tulane.edu/Home/Account/Login>

OR Submit this form to:

Tulane University Financial Aid, Gibson Hall, Suite #130, 6823 St. Charles Avenue, New Orleans, LA 70118