



Instructions for using the IRS Data Retrieval Tool on the FAFSA:

If you have not already used the tool:

- Go to [FAFSA.gov](https://fafsa.gov) and log in to your FAFSA record
- Select "Make FAFSA Corrections"
- Go to the **Financial Information** section of the form.
- Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool and select **Link to IRS**.
- Enter in required fields and submit. Once information populates, check the box allowing the above information to transfer to the FAFSA and select **Transfer Now**. Make sure you and your parent have **signed and resubmitted** the FAFSA.

Instructions for retrieving Tax Transcripts or Non-Filing Letter:

- Go to [www.irs.gov](https://www.irs.gov)
- Select Get Your Tax Record
- Click on Get Transcript by MAIL or ONLINE
- Enter in required information and select continue (if you filed Married filing Joint make sure you are entering in the information for the first person listed on the tax return)
- Under type of transcript select Return Transcript or Non-Filing Letter and for tax year select 2020 then continue

**C. Dependent Student's Income Information to Be Verified**

Check the box that applies: (Only one box in this section needs to be selected)

I, the student, have used the **IRS Data Retrieval Tool** on FAFSA to transfer my 2020 IRS income information into my FAFSA on \_\_\_\_\_ . *(See instructions above for using the Data Retrieval Tool)*  
*(Date Data Retrieval Completed)*

**\*\*Using the Data Retrieval option ensures a faster processing time for verification by the Oregon Tech financial aid office\*\***

The student's 2020 **signed** IRS Tax Returns or IRS Tax Return Transcript(s) is attached. *(See instructions above for getting IRS Tax Transcripts)*

I amended my 2020 Federal Tax Return or Filed Jointly and am now Single. If a filer completed an amended tax return, the financial aid office will need a signed IRS Tax Return or Tax Return Transcript **and** a signed copy of the filed 1040x. If a filer completed a joint tax return but is now single because of a divorce, separation, or death of spouse, the W-2 forms for all income showing on the tax return transcript are required. A tax return transcript is required; **the IRS Data Retrieval Tool will be insufficient in this situation.**

Student was employed in 2020 and **was NOT required to file a Federal Tax Return** and has attached copies of all 2020 W-2 forms issued to you by employers. List every employer and amount earned for 2020 below:

Student Name	Employer's Name	2020 Amount Earned
<i>Missy Jones</i>	<i>Suzie's Auto Body Shop</i>	<i>\$2000.00</i>

Student **was not employed and had no income earned from work in 2020.**

**D. Parent's Income Information to Be Verified**— If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

Check the box that applies: (Only one box in this section needs to be selected)

I, the student's parent(s), have used the **IRS Data Retrieval Tool** on FAFSA to transfer my 2020 IRS income information into my FAFSA on \_\_\_\_\_. (See instructions above for using the Data Retrieval Tool) (Date Data Retrieval Completed)

**\*\*Using the Data Retrieval option ensures a faster processing time for verification by the Oregon Tech financial aid office\*\***

I, the student's parent(s), have attached my 2020 **signed** IRS Tax Returns or IRS Tax Return Transcript(s). (See instructions above for getting IRS Tax Transcripts)

I amended my 2020 Federal Tax Return or Filed Jointly and am now Single. If a filer completed an amended tax return, the financial aid office will need a signed copy of IRS Tax Return or Tax Return Transcripts **and** a signed copy of the filed 1040x. If a filer completed a joint tax return but is now single because of a divorce, separation, or death of spouse, the W-2 forms for all income showing on the tax return transcript are required. A tax return transcript is required; **the IRS Data Retrieval Tool will be insufficient in this situation.**

The parent(s) was employed in 2020 and **was NOT required to file a Federal Tax Return** and:

- has attached the IRS Tax Non Filing Letter (See instructions at the top of the 2<sup>nd</sup> page) **and**
- has attached copies of all 2020 W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer and amount earned for 2020 below:

Parent(s) Name	Employer's Name	2020 Amount Earned
<i>Missy Jones</i>	<i>Suzie's Auto Body Shop</i>	<i>\$2000.00</i>

The parent(s) **was not employed and had no income earned from work in 2020.** I have attached the IRS Tax Non Filing Letter. See instructions at the top of the 2<sup>nd</sup> page.

**E. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

Student \_\_\_\_\_ Date \_\_\_\_\_

Parent \_\_\_\_\_ Date \_\_\_\_\_

*Don't forget to make copies for your own records.*

Please submit all documents to:  
Oregon Tech Financial Aid Office  
3201 Campus Drive  
Klamath Falls, OR 97601

541.885.1280 (phone) 541.885.1024 (fax) [www.oit.edu/faid](http://www.oit.edu/faid) (website) dollars@oit.edu (e-mail)

