

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
- 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:

- have attached the IRS Tax Non Filing Letter (See instructions at the top of the 2nd page) **and**
- have 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**. The parent(s) have attached the IRS Tax Non Filing Letter. See instructions at the top of the 2nd page.

E. Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student **MUST APPEAR IN PERSON** at the Oregon Tech Financial Aid office to verify his or her identity by presenting valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport.

The institution will maintain a copy of the student’s photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student’s ID.

In addition, the student must sign, **in the presence of an institutional official**, the following:

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student’s Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending _____ for 2022-2023.

(Name of Postsecondary Educational Institution)

Student’s Signature Date

School Officer’s Name Title Document Received Date

****If you are unable to bring the document in person to either the Oregon Tech Financial Aid office in Klamath Falls or to the Portland-Metro Campus, you will need to bring the documentation and this form to a notary to be completed. The section for the notary seal and signature is included on the next page of this worksheet****

**Identity and Statement of Educational Purpose
(To Be Signed With Notary)**

If the student is unable to appear in person at Oregon Tech to verify his or her identity, the student must provide:

- (a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student's Name)
Statement of Educational Purpose and that the federal student financial assistance
I may receive will only be used for educational purposes and to pay the cost of attending
_____ for 2022-2023.
(Name of Postsecondary Educational Institution)

(Student's Signature) (Date)

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____,
(Date) (Notary's name)

personally appeared, _____, and provided to me
(Printed name of signer)

on basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)
to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal
(seal)

(Notary signature)

My commission expires on _____
(Date)

F. 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 Signature: _____ Date: _____

Parent Signature: _____ 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 (website) dollars@oit.edu (e-mail)