



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 2019 then continue

**C. Independent 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** in FAFSA on the Web to transfer my (and, if married, my spouse’s) 2019 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 2019 **signed** IRS Tax Returns or IRS Tax Return Transcript(s) is attached. *(See instructions above for getting IRS Tax Transcripts)*

I amended my 2019 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.**

I, the student, (and/or the student’s spouse if married) was employed in 2019 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 page) **and**
- have attached copies of all 2019 W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer and amount earned for 2019 below:

Student/Spouse Name	Employer’s Name	2019 Amount Earned
<i>Missy Jones</i>	<i>Suzie’s Auto Body Shop</i>	<i>\$2000.00</i>

The student (and, if married, the student’s spouse) **was not employed and had no income earned from work in 2019** and:

- have completed the **2021-22 Low Income Statement** available at [www.oit.edu/faid/forms](https://www.oit.edu/faid/forms) **and**
- have attached the IRS Tax Non Filing Letter (See instructions at the top of the page)

**D. High School Completion Status**

Provide one of the following documents that will indicate your high school completion status when you begin college in 2021–2022. Contact the financial aid office if you are unable to obtain the documentation listed below:

- A copy of your high school diploma.
- A copy of your final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript you received after you passed a State-authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma.
- If you completed secondary education in a foreign country, a copy of the “secondary school leaving certificate” or other similar document.
- An academic transcript that indicates you successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.
- If you were homeschooled in a state where state law requires you to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If you were homeschooled in a state where state law does not require you to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by your parent or guardian, that lists the secondary school courses you completed and includes a statement that you successfully completed a secondary school education in a homeschool setting.

### **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 2021-2022.

(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Financial Aid Officer’s Signature

\_\_\_\_\_  
Print Financial Aid Officer’s Name

\_\_\_\_\_  
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 2021-2022.  
(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)

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**F. Sign this Worksheet**

By signing this form you certify that all the information reported on it is complete and correct.

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

**Student** \_\_\_\_\_ **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)