

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 2021 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 2021 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 2021 **signed** IRS Tax Returns or IRS Tax Return Transcript(s) is attached. (See instructions above for getting IRS Tax Transcripts)

- I amended my 2021 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 2021 and **was NOT required to file a Federal Tax Return** and has attached copies of all 2021 W-2 forms issued to you by employers. List every employer and amount earned for 2021 below:

Student Name	Employer's Name	2021 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 2021.**

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 2021 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 2021 **signed** IRS Tax Returns or IRS Tax Return Transcript(s). *(See instructions above for getting IRS Tax Transcripts)*

I amended my 2021 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 2021 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 2nd page) **and**
- has attached copies of all 2021 W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer and amount earned for 2021 below:

Parent(s) Name	Employer's Name	2021 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 2021.** I have attached the IRS Tax Non Filing Letter. See instructions at the top of the 2nd 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 (website) dollars@oit.edu (e-mail)

