

Verification of 2020 Income Information for Parent

Complete part A if you filed a 2020 tax return; complete part B if you did not file a tax return.

A. Tax Return Filers

Important Note: The instructions below apply to each parent included in the household. If the parents filed separate IRS income tax returns for 2020, we will need a 2020 tax return transcript for both parents.

Instructions: Complete this section if the parents filed a 2020 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. DRT is not available if married filing separately, if filing a foreign income tax return, or if filing an amended tax return. Contact the financial aid office if more information is needed about using the IRS DRT.

Check the box that applies

The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA

The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead have provided the school a **2020 IRS Tax Return Transcript(s)**.

A **2020 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

In most cases, for electronic tax return filers, 2020 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2020 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2020 paper IRS income tax returns, the 2020 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2020 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the parents filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s)** must be provided for each.

Note: If you filed a non-IRS income tax return:

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

B. Non-filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2020 income tax return with the IRS.

Note: If amount earned from work is greater than \$12,400 if single, \$24,800 if married under 65, or \$24,800 if widow(er) with a dependent child then you are required to file and must submit an IRS Tax Return Transcript or use the IRS Data Retrieval link in your FAFSA. For more information on tax filing requirements, visit www.irs.gov/publications/p17/.

Check the box that applies:

Neither parent was employed and had no income earned from work in 2020.

One or both parents were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. [Provide copies of all 2020 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

Employer’s Name	2020 Amount Earned	IRS W-2 Provided?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000</i>	<i>Yes</i>

Individuals selected for verification that did not file a 2020 IRS income tax return are required to obtain a “Verification of Non-filing” letter from the IRS. The request for “Verification of Non-filing” can be obtained online at www.IRS.gov:

1. Click on the “Get Transcript of Your Tax Records” link.
2. Select “Verification of Non-filing Letter” and follow instructions.

Or you may use IRS Form 4506-T and check box 7 (Form 4506-T must be mailed directly to the IRS).

Please note, a taxpayer may fail to file a tax return even though there is a filing requirement; the verification letter does *not* address whether or not the taxpayer should have filed a tax return.

Check here if confirmation of non-filing is provided.

Certifications and Signatures

The signature below certifies that all of the information reported is complete and correct. The parent whose information was reported on the FAFSA must sign and date.

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

Print Parent's Name

Parent's Signature

Date

Save the completed form and return as an email attachment to the appropriate financial aid counselor listed below:

- Students Last Names A – E
Sherry Steelman sbrugge@ju.edu
- Students Last Names F – L
Tara Souders lsouder@ju.edu
- Students Last Names M – Q
Brooke Denslow bsellar@ju.edu
- Students Last Names R – Z
Misty Pippin mpippin1@ju.edu