



# New Mexico Junior College

**Financial Aid Office**  
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## 2020-2021 Income Verification Worksheet—Dependent

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected by the federal processor for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected.

### A. Student Information

Student Name: \_\_\_\_\_ NMJC Student ID or SSN: \_\_\_\_\_  
 Student Email: \_\_\_\_\_ Student Ph. #: \_\_\_\_\_

### B. Tax Status Information (Complete both the Student and Parent sections)

Student	Parent(s)
<input type="checkbox"/> I <b>DID</b> file taxes for 2018 and am providing one the following: _____ The student <u>has or will</u> use the IRS DRT tool to transfer 2018 IRS income tax return information into the Student's FAFSA (See page 2 for instructions). _____ The student is <u>unable or chooses not to</u> use the IRS DRT tool, and will provide the school a 2018 Tax Return Transcript (see page 3 for instructions). _____ The student is providing a signed copy of the 2018 IRS Form 1040 that was filed with the IRS. <p style="text-align: center;"><b>Skip to Section D</b></p>	<input type="checkbox"/> I/We <b>DID</b> file taxes for 2018 and are providing one the following: _____ The parent <u>has or will use</u> the IRS DRT tool to transfer 2018 IRS income tax return information into the Student's FAFSA (See page 2 for instructions). _____ The parent is <u>unable or chooses not to</u> use the IRS DRT tool, and will provide the school a 2018 IRS Tax Return Transcript (See page 3 for instructions). _____ The parent is providing a signed copy of the 2018 IRS Form 1040 that was filed with the IRS. <p style="text-align: center;"><b>Skip to Section D</b></p>
<input type="checkbox"/> I certify that I <b>DID NOT</b> file, will not file, and am not required to file a 2018 U.S. Income Tax Return. <p style="text-align: center;"><b>GO to Section C</b></p>	<input type="checkbox"/> I/we certify that we <b>DID NOT</b> file, will not file, and are not required to file a 2018 U.S. Income Tax Return. <p style="text-align: center;"><b>GO to Section C</b></p>

### C. Income Information for Non-Filers ONLY

Total Wages Earned from Work, Salaries, Tips and attach W2's for each job:

Parent 1	\$	Parent 2	\$	Student	\$

#### Please Attach:

- IRS "Verification of Non-Filing Letter" for each Parent (See page 3 for instructions).
- All 2018 W2's for student and parent(s) if applicable.
- Additional information may be requested.

### D. Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one 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.

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

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

## How to Correct Your FAFSA Using IRS Data Retrieval (DRT)

\*\*IRS Data Retrieval (DRT) allows online FAFSA filers to pull specific tax return data from the Internal Revenue Service. You cannot use the IRS DRT for the 2020-2021 FAFSA if you did not file a 2018 tax return.

\*\*If you do not use the IRS Data Retrieval Tool, NMJC will require you to provide a copy of your 2018 IRS Tax Return Transcript or Letter of non-tax filing (Parent).

**Go to FAFSA.gov**

**Login with your FSA ID**

**Select “Continue” or “Make Correction”**

**Select the “Financial Information” tab from the top of the page**

**Instructions for the parent to request the parent IRS information:**

- Go to the “Parent Financial Information” page;
- Answer the questions in the first box to determine if you are eligible to use the IRS DRT;
- If eligible, select which parent is providing information on the FAFSA;
- Enter the FSA ID for the parent providing the information;
- Click “Link to IRS”;
- Complete the form with information EXACTLY as it appears on the parent’s 2018 tax return;  
and
- Select “Transfer My Information into the FAFSA”.

**Instructions for the student to request student IRS information:**

- Go to the “Student Financial Information” page;
- Answer the questions in the first box to determine if you are eligible to use the IRS DRT;
- If eligible, click “Link to IRS”;
- Complete the form with information EXACTLY as it appears on the student’s 2018 tax return;  
and
- Select “Transfer My Information into the FAFSA”.

**You will be redirected to the FAFSA. Retrieved data will be masked but includes:**

- Adjusted gross income
- Education credits
- Taxes paid
- Untaxed portions of IRA distributions and pensions
- Number of exemptions

**Continue through the screens to Sign and Submit your FAFSA.**

# Free 2018 IRS Tax Return Transcript Instructions

## **1. By Phone: Call the IRS at 1-800-908-9946 and listen closely to prompts.**

- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2018.**”
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

## **2. Online: Available at <http://www.irs.gov>**

- In the “**Tools**” Section of the homepage, select “**Get a Tax Transcript**”. Review your options to receive your transcript online or by mail.

“**Get Transcript ONLINE**” The online option will allow you to receive your 2018 transcript immediately but you must have access to an email account and an account in your name from either a credit card, mortgage, home equity loan, home equity line of credit, or a car loan. You must also have a mobile phone with your name on the account. If you have this information, select to “**Get a Transcript ONLINE**” and follow the process through to print your transcript. This process may also be used to get a letter of non filing.

OR, “**Get Transcript by MAIL**”. Enter the tax filer’s Social Security Number, date of birth, street address, and zip code exactly as they appear on the tax return. Use the address currently on file with the IRS. Generally, this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file. Select “Continue” and in the **Type of Transcript** field, select “**Return Transcript**” and in the **Tax Year** field, select “**2018.**” Unacceptable tax forms include an IRS “Tax Account Transcript” and “Tax Summary.” If successfully validated, the tax return transcript will be mailed to the address noted on your 2018 tax return.

## **3. By Mail: (address provided on form for your home state)**

- Use option #3 **ONLY** if your address has changed from the address listed on your filed tax return or this form may be used to request a letter of non tax filing from the IRS.
- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript. Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Use Form 4506T if requesting a letter of non tax filing. Mark option #7.
- Complete *Lines 1 – 4*, following the instructions on page 2 of the form. Note that *Line 3* should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on *Line 4*. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- *Line 5* provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. **Be Advised:** the school may not be able to match the tax return transcript to a student if the surname is different between the tax form and the NMJC Student.
- On *line 6*, enter “**2018**” to receive IRS tax information for the 2018 tax year that is required for the 2020-2021 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return. Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ. Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request.
- **NOTE:** Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.