



2023-24 IRS DATA RETRIEVAL TOOL, TAX RETURN, TAX RETURN TRANSCRIPT, AND VERIFICATION OF NON-FILING INSTRUCTIONS

The instructions below will assist you in providing acceptable 2021 IRS tax return information.

IRS DATA RETRIEVAL TOOL

Go to: studentaid.gov.

1. Click "Log In."
2. Enter your (the student's) FSA ID.
3. Under the "FAFSA Form" drop down at the top of the page, select "Complete FAFSA."
4. Select "I am a student and want to access the FAFSA form."
5. Scroll down to the Additional Actions section, select "Make Corrections," and click "Continue."
6. Create a Save Key and click "Continue."
7. Select the "Student Financials Section."
8. Answer the questions on that page regarding your (the student's) tax filing status. You must answer "Already Completed" to use the IRS Data Retrieval Tool.
9. Click "Link to the IRS."
10. Enter your address exactly as it appears on your tax return.
11. Check "Transfer Tax Information into the FAFSA."
12. For parent IRS Data Retrieval, select "I am a parent filling out a FAFSA form for a student" and follow steps 5-11 above using the parent tax filing status and address exactly as they appear on the parent tax return.
13. Once transferred, click "Next Section" to take you to the "Sign & Submit" tab, then click "Continue." Follow the instructions for both parent and student signatures. Click "Submit my FAFSA Now."

Data transferred into the FAFSA from the IRS will be encrypted and hidden from view on both the IRS Data Retrieval Tool website and the FAFSA web pages.

2021 FEDERAL TAX RETURN

If you cannot use the IRS Data Retrieval Tool, please submit a signed copy of your 2021 federal tax return (IRS Form 1040), including all schedules.

IMPORTANT:

You must write the student's name and Rocket Number on the tax return prior to submitting it to the Office of Student Financial Aid.

2021 FEDERAL TAX RETURN TRANSCRIPT

If you cannot use the IRS Data Retrieval Tool and cannot provide a signed copy of your 2021 federal tax return (IRS Form 1040), please request a copy of your 2021 Tax Return Transcript.

Go to: irs.gov/transcript.

If you have a credit card (not debit), auto loan, mortgage, home equity loan, or home equity line of credit **AND** you have a mobile phone billed to your name:

1. Select "Get Transcript Online."
2. Register/Create account.
3. Select reason for transcript request and tax year requested (2021).

If you are unable to use "Get Transcript Online," use one of the following methods:

Get Transcript by MAIL

1. Go to: irs.gov/transcript.
2. Select "Get Transcript by Mail."
3. For Married Filing Jointly Tax Return Transcripts, the taxpayer (not the spouse on the return) must make the request.
4. Enter personal data and the address used on the tax return submitted to the IRS.
5. Select "Return Transcript" and tax year "2021."

Get Transcript by PHONE

1. Call the IRS at 800.908.9946 to order a 2021 Tax Return Transcript.
2. For Married Filing Jointly Tax Return Transcripts, the taxpayer (not the spouse on the return) must make the request.

IMPORTANT:

When you receive the Tax Return Transcript, you must write the student's name and Rocket Number on the document prior to submitting it to the Office of Student Financial Aid.

2021 VERIFICATION OF NON-FILING LETTER

Go to: irs.gov/transcript.

If you have a credit card (not debit), auto loan, mortgage, home equity loan, or home equity line of credit **AND** you have a mobile phone billed to your name:

1. Select "Get Transcript Online."
2. Register/Create account.
3. Select reason for transcript request and tax year requested (2021).

If you are unable to use "Get Transcript Online" you will need to complete the **IRS Form 4506-T "Request for Transcript of Tax Return"**:

Go to: irs.gov/forms-pubs.

1. Select "Form 4506-T."
2. Complete lines 1a-1b.
3. Complete lines 3-4.
4. Check the box for line 7.
5. Enter "12/31/2021" for line 9.
6. Check the box (above the signature line) that reads: Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.
7. Complete the "Sign Here" section with your signature, the date, and your phone number.
8. Mail the completed/signed Form 4506-T to the applicable address provided in the "Chart for all other transcripts" on page 2 of the Form 4506-T.

IMPORTANT:

When you receive the Verification of Non-Filing Letter, you must write the student's name and Rocket Number on the document prior to submitting it to the Office of Student Financial Aid.

WHAT IF YOU ARE UNABLE TO OBTAIN THE VERIFICATION OF NON-FILING LETTER?

If you are unable to get the Verification of Non-Filing Letter using either of the methods above, you may submit a signed statement affirming that you attempted to obtain the 2021 Verification of Non-Filing Letter, but you were unable to obtain it.

Questions? Please contact Rocket Solution Central (RSC) at 419.530.8700.

TO SUBMIT DOCUMENTS:

Upload to: myUT.toledo.edu
"My Financial Aid"
"Secure Financial Aid Document Upload"

Mail to: The University of Toledo
Office of Student Financial Aid
2801 West Bancroft Street, Mail Stop 314
Toledo, OH 43606-3390

In person: Rocket Solution Central
1200 Rocket Hall

Fax to: 419.530.5835