



WORCESTER
S T A T E
UNIVERSITY

Financial Aid
Phone: 508-929-8056
Fax: 508-929-8194

NAME: _____

ID#: _____

FAC20STI

2020/2021
STUDENT TAX INFORMATION FORM

Important Note: If the student is married and if the student and spouse filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 IRS Tax Return Transcript(s)** must be provided for each.

Instructions: *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA on ___/___/____. (**note: this date is NOT the date you originally completed the FAFSA but the date you updated the FAFSA using the IRS Data Retrieval**).
- The student is unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead has attached a signed **2018 IRS Tax Return (1040, 1040A, or 1040 EZ)** to this form.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead has attached a **2018 IRS Tax Return Transcript(s)** to this form which may be obtained through:
 - Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
 - Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
 - Automated Telephone Request – 1-800-908-9946
 - Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T
 - To make appointment with IRS – 844-545-5640

In most cases, for electronic tax return filers, 2018 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2018 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2018 paper IRS income tax returns, the 2018 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2018 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.

I/we certify that the above information is complete and correct. Do not leave any blanks. If not complete this form will be returned to you.

SIGNATURE(student)_____DATE:_____