

Section 2: Tax Return Information

Did the student file a 2017 tax return?
(Check the box in column below that applies)

Student filed a 2017 tax return and used the IRS Data Retrieval Tool on the FAFSA to transfer tax data from the IRS.

- ✓ *Your tax information has been submitted. Please continue to Section 4 to sign this worksheet.*

Student filed a 2017 tax return and did not use the IRS Data Retrieval Tool on the FAFSA.

Please see instructions on page 3 for your options on acceptable documentation for submitting your 2017 Tax Data. Continue to Section 4 to sign this worksheet.

Student did not file a 2017 tax return.

- **Proceed to Section 3** to confirm any income earned in 2017 (even if that amount is "0") and then continue to Section 4 to sign. Students who are considered independent on the FAFSA, must provide a Verification of Non-Filing letter. (see pg. 3).

Did the parent(s) file a 2017 tax return?
(Check the box in column below that applies)

Parent filed a 2017 tax return and used the IRS Data Retrieval Tool on the FAFSA to transfer tax data from the IRS.

- ✓ *Your tax information has been submitted. Please continue to Section 4 to sign this worksheet.*

Parent filed a 2017 tax return and did not use the IRS Data Retrieval Tool on the FAFSA.

Please see instructions on page 3 for your options on acceptable documentation for submitting your 2017 Tax Data. Continue to Section 4 to sign this worksheet.

Parent did not file a 2017 tax return.

- **Proceed to Section 3** to confirm any income earned in 2017 (even if that amount is "0") and then continue to Section 4 to sign. A parent who did not file a tax return must provide a Verification of Non-Filing letter. (see pg. 3).

Section 3: Income earned from work for Non-Filers

If you worked in 2017 but were not required to file a 2017 tax return, list your employer(s) name and the amount of income earned from each employer. **You MUST attach a 2017 W2 Form from each employer. If you did not earn any income in 2017, please enter "0" in the space below. Do not leave this section blank if you did not file a 2017 tax return.**

Section 4: Certification and Signatures

You (and your spouse if applicable) must sign below certifying the accuracy of the information provided on this form. If you were required to provide parental information on the FAFSA, at least one of your parents must also sign below certifying the accuracy of the information provided on this form. If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

I (we) certify that all of the information on this form is complete and correct.

Student Date

Student's Spouse Date

Parent/Stepparent Date

Instructions for submitting tax return information (Please keep this page)

Official tax return information is required as part of the FAFSA verification process. If you have filed a Form 1040, 1040A, or 1040EZ, the acceptable options for submitting tax information to our office are listed below. If you have filed a 1040X (amended) tax form, please skip to Option D.

- *In order to ensure that your financial aid is reflected on your student account before the tuition due date, please send in the verification worksheet, tax documentation, and any other requested items by the verification priority deadline of **June 1st**. If verification items are turned in after June 1st, your financial aid may not be finalized and will not show on your student account when tuition is due. Payment arrangements may be due without financial aid being taken into account.*

Option A.) Use the IRS Data Retrieval Tool on the FAFSA. (Recommended Method)**

- 1.) Log back into the FAFSA (studentaid.ed.gov/sa/fafsa) to make corrections to your current application. Go to the financial information section of the FAFSA. You will see a "Link to the IRS" button if you are eligible to use the IRS Data Retrieval tool.
- 2.) Click the "Link to the IRS" button and log in with the IRS to retrieve your tax return information.
- 3.) Check the "Transfer My Tax Information into the FAFSA" box and click the "Transfer Now" button. Review the information that was transferred.
- 4.) Sign and Submit your FAFSA. You must submit the FAFSA to the University of Dallas in order for our office to be able to access your updated FAFSA.

Option B.) Provide a signed copy of your 2017 Federal Tax Return

- Tax return must be signed by a taxpayer or the tax preparer.

Option C.) Request your 2017 Tax Return Transcript by one of the following methods:

Get Transcript by MAIL- Go to irs.gov and click "Get Your Tax Record". Click "Get Transcript by MAIL." Make sure to request the "Tax Return Transcript" and NOT the Tax Account Transcript.

- Automated Telephone Request- 1-800-908-9946
- Paper Request Form- IRS Form 4506-T
- Get Transcript ONLINE- Go to irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript".

Option D.) Special Tax Circumstances: Amended tax returns

- If you filed an **amended tax return (Form 1040X)**: Please send us a signed copy of IRS Form 1040X and your **original signed tax return or original tax return transcript**. The original tax return information can be submitted via Option A, B, or C.

Parents and Independent students (students who are not required to provide parental data on the FAFSA) who did not file a 2017 Tax Return, must provide a **Verification of Non-Filing Letter**. You may request a Verification of Non-Filing letter from the IRS by using the paper request 4506-T Form (available at irs.gov). DO NOT list University of Dallas as a third-party recipient when requesting your non-filing letter. You should have the IRS send the document directly to you; then you should submit a copy to us. If you have difficulty in obtaining this document from the IRS, please contact our office.

Sending Tax Returns and Transcripts to the University of Dallas: When a Tax Return Transcript is requested, the IRS will send the transcript to the address they have on file for the taxpayer. The transcript will then need to be sent to the University of Dallas from the taxpayer. When sending tax information (returns or transcripts), please mail, fax, or send through an encrypted or password protected email. The password should be sent in a separate email. Emails that are not password protected will not be accepted and the individual will be asked to send the tax information again through one of the acceptable methods. DO NOT list University of Dallas as a third-party recipient when requesting your tax return transcript. You should have the IRS send the document directly to you; then you should submit a copy to us.