



Office of Financial Aid
Telephone: (416) 257-1350

50 Acacia Avenue, San Rafael, CA 94901-2298
Email:

2021 Tax & Income Information

CERTIFICATION *To be completed by the student and one parent whose information was reported on the FAFSA. The following signatures certify that all the information reported on this worksheet is complete and correct.*

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

Student Signature (required)

Date

Parent Signature (required)

Date

Instructions for Providing Tax Information

Instructions for using the IRS Data Retrieval Tool (DRT) in the FAFSA

1. Login to the _____ and/or parent(s) FSA ID.
2. In the Parent and/or Student Financial Information Section, complete the questions about whether taxes have been filed, the filing status, and whether a Puerto Rican/foreign tax return were filed for 2021.
3. If yo
- 4.

Unusual Tax Filing Circumstances

In some cases, you may not be able to submit a Tax Return Transcript or use the IRS DRT in FAFSA to provide your tax information. Please refer to the situations below for additional information.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2021, must provide the following items:

- Copy of IRS Form 4868 that was filed with the IRS for tax year 2021
- val of an extension beyond the automatic six-month extension for tax year 2021
- Verification of Non-Filing Letter (see instructions on Page 5)
- W-2(s) for each source of employment income received or an equivalent document for tax year 2021
- If self-employed, djusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021 (preferably from an accountant)

Individuals who filed an Amended Return

An individual who amended a U.S. Income Tax Return for tax year 2021 needs to provide the following documents:

Signed and dated copy of the 2021 IRS Form 1040X that was filed with the IRS, **AND**

- o Tax information submitted in the FAFSA using the **IRS Data Retrieval Tool, OR**
- o **A 2021 IRS Tax Return Transcript, OR**
- o A signed copy of the **2021 IRS Form 1040 and the applicable schedules** that were filed with the IRS

Individuals who are Victims of Tax Administration Identity Theft

An individual who was the victim of IRS tax-related identify theft must provide the following items:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that include all of the income and tax information required to be verified **Note:** Individuals must contact the IRS at 1-800-908-4490 to authenticate their identity and request the TRDBV.
- A statement signed and dated by the tax filer indicating that he/she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identify theft.

Individuals who filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of their income tax return that was filed with the relevant tax authority. However, if the Office of Financial Aid questions the accuracy of the information on the signed coy of the income tax return, the tax filer must provide a copy of the tax account information issued by the relevant tax authority before verification can be completed.