

Use the IRS Direct Data Exchange Process

This process can be used when completing or correcting the FAFSA application. You will be required to give your consent to have your 2022 federal income tax information uploaded from the Internal Revenue Service (IRS) into the FAFSA. This is available to the student and/or parent tax filer within 2 to 3 weeks after electronically filing your 2022 Federal income tax return (6-8 weeks if the tax return is filed by paper) and paying your IRS tax liability, if applicable. This is the fastest, easiest and most accurate method to include your final 2022 Federal income tax information on the FAFSA.

OR You May Use the IRS Tax Return Transcript Request Process

2022 Federal income tax filers (students and parents) who elect not to use the IRS Data Retrieval Process or do not qualify to use the IRS Data Retrieval Process must submit a 2022 IRS Tax Return Transcript to the Student Financial Planning Office. To request a return transcript free of charge from the IRS, select the one of the following methods. Your 2022 Federal income tax return must be accepted by the IRS and you must have paid your 2022 IRS tax liability, if applicable, before you may request a transcript.

On-line:

1. Go to www.irs.gov
2. Click on “**Get your tax record**”.
3. You may click on the “**Get transcript online**” blue box and follow the instructions that will allow you to print out **2022** return transcript(s) immediately **OR**
4. You may click on the “**Get transcript by mail**” blue box and enter the tax filer’s Social Security Number, date of birth, street address, and zip code. (Be sure to use the **exact** address currently on file with the IRS). Click Continue; under Select Transcript Type choose, “**Return Transcript**” and under Select Tax Year, select “**2022**”. If successfully validated, tax filers can expect to receive paper IRS Tax Transcript(s) in the mail within 5 – 10 days **OR**
5. By Automated Telephone Request by dialing 1-800-908-9946 and following the prompts. Transcript is generally received within 5-10 business days from the IRS’s receipt of the telephone request.

***If you are unable to obtain the required 2022 Federal Tax Return Transcript(s) by using one of the above methods you will need to contact the IRS at 1-800-829-1040, then choose option #1, option #2, option #1, option #2 or visit your local Internal Revenue Service Office to obtain a copy.*

Process for Parent Non-Tax Filers

Parents who are not required to file 2022 Federal income taxes **must complete and send the enclosed IRS Form 4506-T to request a Verification of Non-Filing letter from the IRS, as required by the Department of Education. Once the Non-Filing letter is received from the IRS, please send to Westminster College, Attn: Financial Aid Office, 501 Westminster Avenue, Fulton, MO 65251**

D. Identity and Statement of Educational Purpose (Choose the In Person or Mail Option)

In Person Option:

The student must appear in person at **Westminster College** to verify his or her identity by presenting an unexpired government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

(Financial Aid Office Staff signature) (Date) (Type of valid (non-expired) government-issued photo ID provided)

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below:

Identity and Statement of Educational Purpose

I certify that I _____ am the individual signing this *Statement of Educational Purpose* and that the
(Print Student's Name)

Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Westminster College** for 2024-2025.

(Student Signature)

(Student ID Number)

(Date)

Mail Option for students unable to appear in person (To Be Signed in the Presence of a Notary):

If the student is unable to appear in person at **Westminster College** to verify his or her identity, the student must provide to the institution:

- a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; **and**
- b) The **original** Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose and that the
(Print Student's Name)

Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Westminster College** for 2024-2025.

(Student Signature)

(Student ID Number)

(Date)

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____, personally appeared,
(Date) (Print Notary's name)

_____, and proved to me because of satisfactory evidence of identification
(Printed name of signer)

_____ to be the above-named person who signed the foregoing instrument.
(Type of unexpired government-issued photo ID provided)

WITNESS my hand and official seal

(Notary signature)

place seal here

My commission expires on _____
(Date)