



STUDENT FINANCIAL SERVICES
Phone: 845-257-3250 Fax: 845-257-3568
www.newpaltz.edu/financialaid

The Federal Central Processing Center requires you (and your parent(s) if you are a dependent student on the FAFSA) to provide documentation of your 2020 Federal Income Tax information on your 2022-2023 FAFSA before your Federal Financial Aid eligibility can be determined by the college. You can satisfy this requirement in one of two ways:

1) UPDATE YOUR 2022-2023 FAFSA USING THE IRS DATA RETRIEVAL TOOL

*****PREFERRED METHOD*****

- Visit studentaid.ed.gov/sa/fafsa and click LOG IN to update your 2022-2023 FAFSA.
- Sign in and navigate to the FINANCIAL INFORMATION tab.
- Select ALREADY COMPLETED under the parent and/or student Tax Information section.
- A series of questions will help determine if you are eligible to use the IRS DATA RETRIEVAL TOOL. Provide the name and other information exactly as provided on the 2020 tax return. If eligible, you will be able to link to the IRS website which displays in a new window. Then follow the steps as prompted.
 - If you need help you can view the HELP AND HINTS sidebar, you can utilize LIVE HELP chat on the FAFSA *website*, or you can always call 1-800-433-3243.
 - If the FAFSA site says that you are not eligible to use the IRS Data Retrieval tool then you can use option #2 that is listed below.
- The updated FAFSA should be received by SUNY New Paltz within 2 weeks. At that time the requirement will then get satisfied on my.newpaltz.edu. Please make sure to provide any other requested documents posted on your my.newpaltz.edu account to finalize your eligibility.

OR...

2) SUBMIT A SIGNED COPY OF YOUR 2020 FEDERAL TAX RETURN (1040 AND ANY TAX SCHEDULES 1, 2, 3) TO STUDENT FINANCIAL SERVICES AT SUNY NEW PALTZ

OR... REQUEST A 2020 IRS TAX RETURN TRANSCRIPT

- To request a 2020 IRS Tax Return Transcript, visit www.irs.gov or call 1-800-908-9946.
- Be sure to request a tax **RETURN TRANSCRIPT**, not an "account transcript".

➤ ***Please write the student's ID and name on the documents being submitted to the office.***

WHAT IF I WAS NOT REQUIRED TO FILE 2020 TAXES?

Except for dependent students, if you were not required to file Federal taxes in 2020 you need to request an **IRS CONFIRMATION OF NON-FILING LETTER** by completing and faxing/ mailing IRS form 4506-T (check box 7) to the IRS. For section 9, list the year of 12/31/2020.

Please make sure to also provide any other requested documents posted on your my.newpaltz.edu account to finalize your eligibility.