







## INSTRUCTIONS FOR OBTAINING REQUIRED INCOME TAX INFORMATION

Steps 3 of the Independent Verification Worksheet requests information about the student (and spouse) 2024 Federal Tax Return data. To provide this to Johnson C. Smith University you will need to consent to the use of the FUTURE Act Direct Data Exchange (FA-DDX) tool, on the FAFSA **OR** request a 2024 IRS Tax Return Transcript from IRS **OR** submit a physically signed copy of your 2024 Federal 1040 Tax Return and schedules 1, 2, 3 (if applicable). Student's (and spouse) that did not file a 2024 Federal Tax Return must provide a Verification of Non-Filing Letter from the IRS and copies of all W2's (if applicable). Student's (and spouse) that did not file a 2024 Federal Tax Return must provide copies of all W2's (if applicable). Below you will find directions on how to consent to the use of the FUTURE Act Direct Data Exchange tool, and how to request an IRS Tax Transcript or Verification of Non-Filing Letter.

### Using the FUTURE Act Direct Data Exchange tool

Spouse - Access your spouse invite from your personal email address and click 'Log In' to access the spouse contributor section of the FAFSA. In your spouse contributor section of your students FAFSA you consented to have your Federal Tax Information (FTI) obtained automatically from the IRS and provided on the FAFSA application. If your 2024 Federal Taxes were filed and your information was retrieved, then you were not asked to manually provide FTI data and can mark the first option in Step 4 above.

### Requesting an IRS Tax Return Transcript

A 2024 IRS Tax Return Transcript may be obtained through:

- Get Transcript Online - Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Sign in to your online account." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the [ID.me IRS Help Site](#).
- Get Transcript by Mail - Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request - 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4560-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

### Verification of Non-Filing Letter

To obtain a 2024 Verification of Non-filing letter go to [www.irs.gov](http://www.irs.gov) and click "Get your tax records and transcripts". Then choose "Sign into your online account" or "Get Transcript by Mail". To verify your identity with ID.me, you will need to provide a photo of an identity document such as a driver's license, state ID, or passport. You will also need to take a selfie with a smartphone or a computer with a webcam. The transcript displays online upon successful completion of the IRS's two-step authentication. If you already have an account established, you can log in to access a Verification of Non-filing letter. Requests can be made by completing a 4506-T that can be mailed or faxed to the IRS. Verification of Non-filing letters requested by 4506-T are generally received within 10 business days from the IRS's receipt of your request.