



## 2024-2025 VERIFICATION WORKSHEET

### DEPENDENT STUDENT

#### C. TAX AND INCOME INFORMATION – CHECK THE BOX(ES) THAT MAY APPLY

STUDENT	PARENT	FOLLOW INSTRUCTIONS FOR EACH SECTION
<input type="checkbox"/> Filed	<input type="checkbox"/> Filed Jointly	Used FA-DDX & <b>successfully transferred unchanged</b> 2022 federal tax data into the FAFSA. <b>In most cases, no further documentation is needed to verify 2022 income &amp; IRS Tax information if FA-DDX was used. If additional information is needed, a financial aid counselor will contact you.</b>
<input type="checkbox"/> Filed	<input type="checkbox"/> Filed Jointly	Used FA-DDX & was <b>unsuccessful in transferring</b> filed 2022 federal tax data into the FAFSA. <b>Go to section E</b>
	<input type="checkbox"/> Filed Separate	Parent(s) filed separate 2022 federal tax return. <i>The FA-DDX cannot be used.</i> <b>Go to section E</b>
<input type="checkbox"/>	<input type="checkbox"/>	Granted a filing extension by the IRS. <b>Go to section F</b>
<input type="checkbox"/>	<input type="checkbox"/>	Victims of IRS Tax-Related Identity Theft. <b>Go to section G</b>
<input type="checkbox"/>	<input type="checkbox"/>	Amended tax return filed after FAFSA was submitted. <b>Go to section H</b>
<input type="checkbox"/>	<input type="checkbox"/>	Filed a Non-IRS income tax return. <b>Go to section I</b>
<input type="checkbox"/> Non-Tax Filer	<input type="checkbox"/> Non-Tax Filer	Did not, will not, or was not required to file a 2022 IRS income tax return.

#### Non-Tax Filers

1. Indicate below each source of income even if an IRS W-2 was not issued.
2. Provide copies of W-2(s) for each source of 2022 income earned.
3. No W-2(s) available – Request a **wage and tax statement** for each individual and source of earned income. IRS link: <https://www.irs.gov/forms-pubs/about-form-4506-t>
1. Verification of Non filing is required for each non-tax filer. Provides proof from the IRS that you did not and were not required to file a 2022 return. <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>

NON-TAX FILER INCOME SOURCE	2022 INCOME EARNED	W-2 Provided
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

**D. Certification** - Signing below certifies that all the information reported is complete and accurate to the best of your knowledge.  
**Warning:** If you purposely give false or misleading information, you may be fined, incarcerated, or both.

**Manually sign with a ballpoint pen** - Forms with typed signatures cannot be accepted. Complete this form and return pages 1 & 2 to the financial aid office. Documents can be scanned and returned via e-mail (recommended), mailed, or hand delivered to the Financial Aid office.

\_\_\_\_\_  
Student Printed Name

\_\_\_\_\_  
Student ID#

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

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## DEPENDENT STUDENT

### Section E TAX FILERS

A 2022 IRS Tax Return Transcript may be obtained through:

- **Get IRS Transcript Online** – [www.irs.gov](http://www.irs.gov)
  1. Click - Get Your Tax Record & then Click – Get Transcript Online.
  2. Request the **“Return Transcript”** and **NOT** the **“Account Transcript.”**  
Note - Get Transcript Online tool requires the following:
    - A. Access to a valid email address.
    - B. A text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and
    - C. Specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan).
    - D. The transcript will display online upon successful completion of the IRS’s two-step authentication.
- **Get IRS Transcript by Mail** – [www.irs.gov](http://www.irs.gov) – Transcript receipt within 10 business days.
  1. Click - Get Your Tax Record & then Click - Get Transcript by Mail.
  2. Request the **“Return Transcript”** and **NOT** the **“Account Transcript.”**
- **Unable to get a Transcript** - If unable to get a copy of your transcript, you may submit a signed (wet signature) 2022 IRS tax return with all applicable schedules (1, 2, 3).

### Section F FILING EXTENSION

Individuals granted an extension for 2022 beyond the automatic six-month extension, must provide:

1. A signed statement listing the sources of any 2022 income and the amount of income from each source;
2. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
3. A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2022; and
4. If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2022.

### Section G VICTIMS OF IRS TAX-RELATED IDENTITY THEFT

Victims of IRS tax-related identity theft must provide:

1. A Tax Return Database View (TRDBV) transcript obtained from the IRS;
2. If unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; **and**
3. A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax- related identity theft and that the IRS is aware of the tax-related identity theft.

### Section H AMENDED TAX RETURN

Individuals who filed an amended 2022 IRS income tax return must provide:

1. Signed copy of the 2022 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:
  - a. Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
  - b. A 2022 IRS Tax Return Transcript that will only include information from the original tax return and does not have to be signed, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
  - c. A signed copy of 2022 IRS Form 1040 and the applicable schedules 1, 2, 3 that were filed with the IRS.

### Section I FILED A NON IRS INCOME TAX RETURN

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.