

C. Dependent Student's Income Information To Be Verified

TAX RETURN FILERS — **Important Note:** If the student filed, or will file, an amended 2023 IRS tax return, a non-IRS Income Tax Return, was granted a filing extension by the IRS, or was the victim of IRS tax-related identity theft they must contact the Office of Financial Aid before completing this section.

Instructions: Complete this section if the student filed or will file a 2023 IRS income tax return. As part of federal student aid eligibility, students will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student filed a 2023 IRS income tax return, the student must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax return information for the student was not transferred via the FA-DDX and considered verified, the student should provide the institution with the following:

- A 2023 IRS Tax Return Transcript, or a signed copy of the 2023 income tax return and applicable schedules.

A **2023 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to 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.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- 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 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Student Name: _____

SSN (Last Four Digits) _____

TAX RETURN NON-FILERS— By completing this section, you certify that you have **not filed** and are **not required** to file a 2023 income tax return, and you have listed all income earned from work, other income, and resources for the 2023 tax year.

Check the box that applies:

- The student was not employed and had no income earned from work in 2023.
- The student was employed in 2023 and has listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. Copies of all 2023 W-2 forms issued to the student by employers must be provided. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student’s name and ID number at the top.*

| Employer’s Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2023 |
|---|---|------------------------------|
| <i>(Example) ABC’s Auto Body Shop</i> | <i>Yes</i> | <i>\$4,500.00</i> |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

- The student had other income and resources that supported them for the 2023 tax year. *List each source of income in the table below. If more space is needed, provide a separate page with the student’s name and ID number at the top.*

| Source of Income | Annual Amount in 2023 | |
|----------------------------------|-----------------------|----|
| <i>(Example) Rental Property</i> | <i>\$4,500.00</i> | |
| | | |
| | | |
| | | |
| Total Amount of Income | | \$ |

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2024 that indicates a 2023 IRS income tax return was not filed with the IRS or other relevant tax authority. An official IRS Letter of Non-Filing can be obtained at [irs.gov](https://www.irs.gov). If unable to obtain a Letter of Non-Filing, a signed and dated statement certifying that the individual has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source (listed above).

____ Check here if IRS confirmation of non-filing, or signed and dated statement is provided.

Student Name: _____

SSN (Last Four Digits) _____

D. Parent(s) Income Information To Be Verified

TAX RETURN FILERS — **Important Note:** If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

Parent's Current Marital Status (Please check one):

Single: _____ Married/Remarried: _____ (Date: _____) Separated: _____ (Date: _____)

Divorced: _____ (Date: _____) Widowed: _____ (Date: _____)

Important Note: If the parent(s) filed, or will file, an amended 2023 IRS tax return, a non-IRS Income Tax Return, was granted a filing extension by the IRS, or was the victim of IRS tax-related identity theft they must contact the Office of Financial Aid before completing this section.

Instructions: Complete this section if the parents filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax return information for the parents was not transferred via the FA-DXX and considered verified, the parents should provide the institution with the following:

- A 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

A 2023 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to 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.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- 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 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Student Name: _____

SSN (Last Four Digits) _____

PARENT(S) TAX RETURN NON-FILERS— By completing this section, you certify that **neither parent has filed nor is required to** file a 2023 income tax return, and all their income earned from work, other income, and resources for the 2023 tax year are listed below.

Check the box that applies:

- Neither parent was employed, and neither had income earned from work in 2023.
- One or both parents were employed in 2023 and has listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. Copies of all 2023 IRS W-2 forms issued to the parent(s) by their employers must be provided. List every employer even if the employer did not issue an IRS W-2 form.
If more space is needed, provide a separate page with the student's name and ID number at the top.

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2023 |
|---|---|------------------------------|
| <i>(Example) ABC's Auto Body Shop</i> | <i>Yes</i> | <i>\$4,500.00</i> |
| | | |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

- One or both parents had other income and recourses that supported them for the 2023 tax year. *List each source of income in the table below. If more space is needed, provide a separate page with the student's name and ID number at the top.*

| Source of Income | Annual Amount in 2023 |
|----------------------------------|-----------------------|
| <i>(Example) Rental Property</i> | <i>\$4,500.00</i> |
| | |
| | |
| | |
| | |
| Total Amount of Income | \$ |

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2024 that indicates a 2023 IRS income tax return was not filed with the IRS or other relevant tax authority. An official IRS Letter of Non-Filing can be obtained at [irs.gov](https://www.irs.gov). If unable to obtain a Letter of Non-Filing, a signed and dated statement certifying that the individual has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source (listed above).

____ Check here if IRS confirmation of non-filing, or signed and dated statement is provided.

Student Name: _____

SSN (Last Four Digits) _____

E. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Print Student's Name
(Blue or black ink, no electronic signatures accepted)

Date

Student's Signature
(Blue or black ink, no electronic signatures accepted)

Date

Parent's Signature
(Blue or black ink, no electronic signatures accepted)

Date