

Student's Name: SSN:

C. Student's Income Information to Be Verified: Only check ONE BOX that applies.

1. **TAX RETURN FILERS**—Important Note: The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2022 or had a change in marital status after December 31, 2022.

INSTRUCTIONS: Complete this section if the student and spouse filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, students and spouses (as appropriate), 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 to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2022 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 2022 income information that was transferred onto the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

Check the box that applies:

I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2022 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. Your school will use the IRS information that was transferred in the verification process.

Check here if an IRS tax return transcript or a signed tax return is attached to this worksheet.

2. **TAX RETURN NONFILERS**—Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2022 income tax return with the IRS.

Check the box that applies:

The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2022.

The Student (and/or the Student's spouse if married) was employed in 2022 and has listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form is attached. Attach copies of all 2022 IRS W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and Social Security Number at the top.

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
SUZY'S AUTO Body Shop (example)	\$2,000.00(example)	Yes(example)

Dependents Students Only: Only check ONE BOX that applies.

D. Parent's Income Information to be verified, note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. **TAX RETURN FILERS**—Important Note: If the student's parent(s), filed or will file, an amended 2021 IRS tax return the student's financial aid administrator MUST be contacted before completing this section.

INSTRUCTIONS: Complete this section if the student's parent(s) filed or will file a 2022 income tax RETURN with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2022 IRS income tax information into the student's FAFSA. It takes UP to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax RETURN filers, and UP to eight weeks for paper IRS tax RETURN filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator. (If you need instructions on how to receive your tax return transcript, please see the back page.)

Check the box that applies:

The student's parent has USED the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2022 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student's school will USE the IRS information transferred into the student's FAFSA to complete the verification process.

Check here if an IRS tax return transcript(s) or signed tax return(s) is attached to this worksheet.

2. **TAX RETURN NONFILERS**— Complete this section if the student's parent(s) will not file and is not REQUIRED to file a 2021 income tax return with the IRS.

Check the box that applies:

The parent(s) was not employed and had no income earned from work in 2022.

The parent(s) was employed in 2022 and has listed below the names of all the parent's employers, the amount earned from each employer in 2022, and whether an IRS W-2 form is attached. Attach copies of all 2022 IRS W-2 forms ISSUED to the parent(s) by employer(s). List every employer even if they did not ISSUE an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

Employer's Name	2022 Amount Earned	IRS W-2 Attached?
SUZY'S AUTO Body Shop (example)	\$2,000.00 (example)	Yes (example)

G. Untaxed Income and Benefits

Provide the requested AMOUNTS for items listed (from FAFSA) below. Do not leave any space blank (if the items do not apply enter zero). Amounts reported should be for the 2022 calendar year.

STUDENT Information	Item	Parent Information (If Dependent)
\$	Child Support RECEIVED for any of YOUR children. Do not include foster care or adoption payments. If yes, provide a printed confirmation/proof of the amount received for 2022.	\$
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, BUT not limited to AMOUNTS reported on the w-2 forms in Boxes 12a THROUGH 12d, codes, D, E, F, G, H, and S.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$
\$	Veterans non-EDUCATION benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Other UNTAXED income not reported such as workers' compensation, disability, etc. (Do not include untaxed social security or SSI payments) Include UNTAXED portion of health savings ACCOUNTS from IRS 1040.	\$
\$	Money received or paid on YOUR behalf (Example: Bills) not reported elsewhere on this form.	\$

G. Certification and Signatures

Each person signing this worksheet certifies that all the information reported on it is complete and correct. If you were REQUIRED to provide parental information, at least one of YOUR parents MUST also sign below certifying the ACCURACY of the information provided on this form.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

STUDENT'S SIGNATURE

Date

Parent's SIGNATURE

Date

All forms MUST be returned to Financial Aid!

A 2022 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 transcripts 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.