

Income Verification

Complete this section if you, the student and/or your spouse filed a 2020 income tax return with the IRS.

As part of verification, the Financial Aid Office is required to collect your official tax data, either through the FAFSA IRS Data Retrieval Tool (DRT) or via an IRS Tax Return Transcript. A copy of your Tax Return (1040, 1040A, or 1040EZ) is *not* acceptable for verification purposes. You must complete one of the steps outlined in the chart below.

Please review and check one of the following:

<input type="checkbox"/> I have successfully used the FAFSA's IRS Data Retrieval Tool to load my (and my spouse's) income information onto the FAFSA and submitted the FAFSA transaction.
<input type="checkbox"/> I have not yet, but will use the FAFSA's Data Retrieval Tool (<i>instructions below</i>) to transfer my (and my spouse's) income information onto the FAFSA. (<i>please note verification cannot be completed until this information is received</i>)
<input type="checkbox"/> I am unable or chose not to use the FAFSA's Data Retrieval Tool to transfer my income information. I have attached a copy of my 2020 <i>signed</i> Tax Return here. (If you have not retained a copy of your 2020 tax return, you can request a copy of your 2020 Tax Return Transcript to be mailed to you (<i>instructions below</i>)).
<input type="checkbox"/> I filed an Amended Income Tax Return, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. I will contact the Financial Aid Office for detailed instructions on how to complete verification.
<input type="checkbox"/> I did not and am not required to file a 2020 Federal Tax Return. I will complete the Tax Return Non-Filer section below.

- The best way to verify income is by using the IRS Data Retrieval Tool (DRT) on the FAFSA. If you have not already used the tool, go to [FAFSA.gov](https://fafsa.gov), log in to the 2022-2023 FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2020 IRS tax information into the FAFSA. After uploading tax data, **please be sure to submit the FAFSA.**
- To obtain a 2020 Federal Tax Return Transcript from the IRS, go to www.irs.gov and click on the "Get Your Tax Record" link, or call **1-800-908-9946**. Make certain to request the "IRS Tax **Return** Transcript" and not the "IRS tax *account* transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2020 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

Tax Return Non-Filers

Complete this section if you, the student and/or your spouse will not file and are not required to file a 2020 income tax return with the IRS, but earned income from work in 2020. More information about who is required to file can be found at www.irs.gov. If you are required to file a return, but have not, you must file your return in order to be considered for Federal Student Aid.

1. In the following table, please list all earnings from work during 2020 **and attach a 2020 W2 or 1099-MISC for each line item**. Your application cannot be considered complete until all earnings from work can be verified with a W2 or 1099-MISC.

Source of Income from Work in 2020	Student	Spouse	IRS W-2 or 1099 Attached?
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Total Income from Work in 2020	\$	\$	

- If you did not retain copies of your 2020 W-2(s), you can obtain a 2020 Federal Wage and Income Transcript from the IRS, call **1-800-908-9946** or go to www.irs.gov. There, click on the “Get Your Tax Record” link. Follow the on-screen instructions to log in or to create an IRS account. Once your account is created, make certain to request the **2020 “Wage and Income Transcript,”** and submit this to the Financial Aid Office.
2. For both parent and student non-tax filer, provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2020 that indicates a 2020 IRS income tax return was not filed with the IRS or other relevant tax authority. To obtain confirmation of non-filing, go to www.irs.gov and click on the “Get Tax Record” link. Make certain to request the “Verification of Non-filing Letter”. Alternatively, a confirmation of non-filing can be obtained from the IRS using Form 4506-T and checking box 7. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

Check here if confirmation of non-filing is provided.

Check here if confirmation of non-filing will be provided later.

Verification of Other Untaxed Income

Complete this section for you and your spouse. **Please indicate “zero” if not applicable. DO NOT LEAVE BLANK.**

1. **If you did not have any source of work income in 2020, please attach a statement describing how you met your living expenses in 2020.**
2. **Payments to tax-deferred pension and retirement savings** – List any payment (direct or withheld from earnings) to tax deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d codes D, E, F, G, H, and S.

Name of Person (Student or Spouse) Who Made the Payment	Annual Amount Paid in 2020
	\$
	\$
	\$
	\$
Total Payments to Tax-deferred Pension and Retirement Savings:	\$

Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

Print Student's Name

Print Spouse's Name

Student's Signature

Date

Spouse's Signature

Date