

Income Verification

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 2023 or had a change in marital status after December 31, 2023.

Instructions: Complete this section if the student and spouse filed or will file a 2023 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 obtain or use such data is ineffective. In other words, if the student and spouse 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.

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

Please review and check one of the following:

I have successfully used the FAFSA's Direct Data Exchange to retrieve my (and my spouse's) income information onto the FAFSA and submitted the FAFSA transaction. No other documentation is needed for income verification.

I am unable to use the FAFSA's Direct Data Exchange to transfer my income information. I have attached a copy of my 2023 **signed** Tax Return here. (If you have not retained a copy of your 2023 tax return, you can request a copy of your 2023 **Tax Return Transcript** to be mailed to you (*instructions below*)).

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.

I certify that my spouse and I were not employed and did not have earned income in 2023. I will complete the **Tax Return Non-Filer** section below.

My spouse and/or I were employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023.

A 2023 Federal Tax Return Transcript may be obtained from the IRS 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.

Tax Return Non-Filers

Complete this section if: 1. you, the student and/or your spouse will not file and are not required to file a 2023 income tax return with the IRS, but earned income from work in 2023 or 2. you, the student and/or your spouse were not employed and had no income earned from work in 2023.

1. In the following table, please list all earnings from work during 2023 **and attach a 2023 W2 or 1099-MISC for each line item**. 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.

Your application cannot be considered complete until all earnings from work can be verified with a W2 or 1099-MISC.

Employer or Source of Income from Work in 2023	Student	Spouse	IRS W-2 or 1099 Attached?
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Total Income from Work in 2023	\$	\$	

- If you did not retain copies of your 2023 W-2(s), you can obtain a 2023 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 **2023 “Wage and Income Transcript,”** and submit this to the Financial Aid Office.
2. Provide 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. Check here if confirmation of non-filing is provided.

Check here if non-filing statement is signed and dated.

Check here if non-filing statement 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 2023, please attach a statement describing how you met your living expenses in 2023.**
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 2023
	\$
	\$
	\$
	\$
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