

Your 2023-2024 FAFSA was selected for review in a process known as **verification**. Federal law states that we have the right to confirm the reported information before offering or disbursing federal student aid. Financial Aid & Veterans Services staff will compare the information provided on the FAFSA for you and your spouse (*if married*) with the information in this verification form and any required documentation. **PLEASE NOTE – Your eligibility for financial aid can be established only when the verification process is complete.**

**STUDENT NAME:** \_\_\_\_\_ **STUDENT ID:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_  
STREET OR PO BOX CITY STATE ZIP

**IMPORTANT:** If you were married on the day you submitted the FAFSA, report information for you **AND** your spouse. *\*\*If you were unmarried or separated, please ignore all references to “spouse.”* Notify the financial aid office if you and your spouse filed separate IRS income tax returns for 2021 or if you experienced a marital status change after December 31, 2021.

**Instructions:** Complete this form using blue or black ink if you and your spouse filed or will file a 2021 IRS income tax return(s). *The best way to verify income is using the IRS Data Retrieval Tool (IRS DRT), part of FAFSA on the Web at studentaid.gov.* In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

- The student/spouse has used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The student/spouse has not yet used the IRS DRT in *FAFSA on the Web* but will use the tool to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The student or spouse is not eligible or chooses not to use the IRS DRT in *FAFSA on the Web* and instead will provide the institution with the **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return(s) and applicable schedules.**

A **2021 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Request the **“Return Transcript”** and **NOT** the “Account Transcript.” The transcript is generally received within **ten business days** from the IRS’s receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." 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. The transcript is generally received within **ten business days** from the IRS receiving the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within **ten business days** from the IRS receiving the paper request form.

NOTE: If the student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used, and the **2021 IRS Tax Return Transcript(s) OR a signed copy of the 2021 income tax return and applicable schedules** must be provided for each tax filer.

- Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is attached.
- Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

**CERTIFICATION AND SIGNATURES**

By signing below, I certify that all information reported on this form, plus any included documentation is accurate and complete.

\_\_\_\_\_  
STUDENT SIGNATURE (REQUIRED)

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SPOUSE SIGNATURE (*Optional*)

\_\_\_\_\_  
DATE

# Verification of 2021 Income Information for Individuals with Unusual Circumstances

## Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for the tax year 2021 must provide the following:

- ▶ A copy of the IRS's approval of an extension beyond the automatic six-month extension for the tax year 2021;
- ▶ Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022, or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to get the required documentation;
- ▶ A copy of IRS Form W-2 for each source of employment income received or an equivalent document for the tax year 2021 and,
- ▶ 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 the tax year 2021.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2021 tax account information.

## Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for the tax year 2021 must provide a signed copy of the 2021 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:

- ▶ IRS DRT information on an ISIR record with all tax information from the original tax return.
- ▶ A 2021 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
- ▶ A signed copy of the 2021 IRS Form 1040 and the applicable schedules filed with the IRS.

## Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide the following:

- ▶ A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to get a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2021 income tax return and applicable schedules the individual filed with the IRS; AND
- ▶ A statement signed and dated by the tax filer indicating that they were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

## Individuals Who Filed Non-IRS Income Tax Returns

- ▶ A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of their income tax return filed with the relevant tax authority. However, suppose we question the accuracy of the information on the signed copy of the income tax return. In that case, 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.