

Print Student Name: _____

Student ID Number: _____

C. Independent Student's Income Information to Be Verified

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 and 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 via the FA-DDX.

If 2023 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, 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.**

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." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the [ID.me IRS Help Site](https://www.irs.gov/identity).
- 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.

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2. **TAX RETURN NONFILERS** –The instructions and certifications below apply to the student and spouse (if the student is married). Complete this section if the student and spouse will not file and are not required to file a 2023 income tax return with the IRS. **By completing this section, I certify that I have not and am not required to file a 2023 income tax return, and have listed all income earned from work, other income, and resources for the 2023 tax year.**

Also check any box that applies below:

___ My spouse and I were not employed and had no income earned from work in 2023.

___ 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, and whether an IRS W-2 form or equivalent document is provided. [Provide copies of all 2023 IRS W-2 forms issued to you and/or your spouse. 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 your 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>	Yes	\$4,500.00
Total Amount of Income Earned from Work		\$

___ My spouse and/or I had other income and resources for the 2023 tax year. [List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top.]

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

D. Certification and Signature

I certify that all 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, you may be fined, sent to prison, or both.**

Student Signature (required)

Date

Spouse Signature (optional)

Date