

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** If the student filed, or will file, an amended 2019 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student and spouse filed or will file a 2019 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2019 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- The student **has used** the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2019 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- The student **has not yet used** the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2019 IRS income information into the student's FAFSA once the student has filed a 2019 IRS tax return.
- The student is **unable or chooses not to** use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2019 IRS tax return transcript**—not a photocopy of the income tax return.

A 2019 IRS Tax Return Transcript may be obtained through:

- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax 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, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax 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.

- Check here if the student's IRS tax return transcript is attached to this worksheet.
- Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

2. TAX RETURN NONFILERS—Complete this section if the student, will not file and is not required to file a 2019 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2019.
- The student was employed in 2019 and has listed below the names of all the student's employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is attached. Attach copies of all 2019 IRS W-2 forms issued to the student 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 the student's name and Social Security Number at the top.*

| Employer's Name | 2019 Amount Earned | IRS W-2 Attached? |
|--|----------------------------|---------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00(example)</i> | <i>Yes(example)</i> |
| | | |
| | | |

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 2019 IRS tax return the student's financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if the parents filed or will file a 2019 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2019 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. **Check the box that applies:**

- The student's parent **has used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2019 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- The student's parent **has not yet** used the IRS Data Retrieval Tool, but will use the tool to transfer 2019 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed.
- The parent **is unable or chooses not to** use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2019 IRS tax return transcript(s)**—not photocopies of the income tax return.

A 2019 IRS Tax Return Transcript may be obtained through:

- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax 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, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax 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.

- Check here if an IRS tax return transcript(s) is attached to this worksheet.
- Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and is not required to file a 2019 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 2019.
- The parent(s) was employed in 2019 and has listed below the names of all the parent's employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is attached. Attach copies of all 2019 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 | 2019 Amount Earned | IRS W-2 Attached? |
|--|-----------------------------|----------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00 (example)</i> | <i>Yes (example)</i> |
| | | |
| | | |
| | | |

Student's Name: _____ SSN: _____

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2019 IRS income tax return was not filed with the IRS or other relevant tax authority.

- Check here if confirmation of nonfiling is provided.
- Check here if confirmation of nonfiling will be provided later.

E. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

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

***Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.***

You should make a copy of this worksheet for your records.