

Student's Name: _____ SSN: _____

C. Independent Student's Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** If you (or your spouse, if married) filed, or will file, an amended 2023 IRS tax return, you must contact your financial aid administrator before completing this section.

Instructions: Complete this section if the student and spouse filed or will file a 2023 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](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2023 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** transferred Federal Tax Information from the IRS into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- The student **has not yet** transferred Federal Tax Information from the IRS, but will transfer 2023 IRS income information into the student's FAFSA once the student has filed a 2023 IRS tax return.
- The student is **unable or chooses not to** transfer Federal Tax Information from the IRS, and the student will submit to the school a **2023 IRS tax return transcript**—not a photocopy of the income tax return.

A 2023 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 you, the student (and, if married, your spouse), will not file and are not required to file a 2023 income tax return with the IRS.**

Check the box that applies:

- The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2023.
- The student (and/or the student's spouse if married) was employed in 2023 and has listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is attached. Attach copies of all 2023 W-2 forms issued to you (and, if married, to your spouse) by employers. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top.*

Employer's Name	2023 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

Student's Name: _____ **SSN:** _____

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2023 that indicates a 2023 IRS income tax return was not filed with the IRS or other relevant tax authority.

____ Check here if confirmation of non-filing is provided.

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

D. 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.

Student's Signature

Date

Spouse'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.