

SECTION C1: STUDENT 2020 IRS INCOME TAX FILER

Instructions: Complete this section if the student filed a 2020 IRS Income Tax Return. 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 2020 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

How will you provide your 2020 Income Tax Return Information? Check the box that applies:

- IRS DRT** -The student **has used** the IRS DRT in the *FAFSA on the Web* to transfer 2020 IRS income tax information into the student’s FAFSA.
- Will use the IRS DRT**- The student **has not yet used** the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student’s FAFSA once the 2020 IRS income tax return has been filed.
- Will provide a copy of your 2020 IRS Tax Transcript or Return**- The student is **unable or chooses not to use** the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2020 IRS Tax Return Transcript**.

A **2020 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." 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.

SECTION C2: STUDENT NON-TAX FILER

Instructions: Complete this section if the student **DID NOT file a 2020 Tax Return** and **are not required** to file a 2020 income tax return with the IRS.

Check the box that applies:

- UNEMPLOYED**- The student **was not employed** and had **no income** earned from work in 2020.
- EMPLOYED**- The student **was employed in 2020** and has listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. **{Provide copies of all 2020 IRS W-2 forms issued to the student by their employers}. 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 the student’s name and ID number at the top.

| Employer’s Name | 2020 Amount Earned | IRS W-2 Provided? |
|-----------------|--------------------|-------------------|
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*****Please Note: We may require you to provide documentation from the IRS that indicates a 2020 IRS income tax return was not filed with the IRS.**

SECTION D1: PARENT 2020 IRS INCOME TAX FILER

Instructions: Complete this section if the parent(s) filed a 2020 IRS Income Tax Return. 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 2020 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

How will you provide your 2020 Income Tax Return Information? Check the box that applies:

- IRS DRT** -The parent **has used** the IRS DRT in the *FAFSA on the Web* to transfer 2020 IRS income tax information into the student’s FAFSA.
- Will use the IRS DRT**- The parent **has not yet used** the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student’s FAFSA once the 2020 IRS income tax return has been filed.
- Will provide a copy of your 2020 IRS Tax Transcript or Return**- The parent is **unable or chooses not to use** the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2020 IRS Tax Return Transcript**.

A **2020 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." 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.

SECTION D2: PARENT NON-TAX FILER

Instructions: Complete this section if the parent(s) **DID NOT** file a 2020 Tax Return and **are not required** to file a 2020 income tax return with the IRS.

Check the box that applies:

- UNEMPLOYED**- The parent **was not employed** and had **no income** earned from work in 2020.
- EMPLOYED**- The parent **was employed in 2020** and has listed below the names of all employers. The amount earned from each employer in 2020, and whether an IRS W-2 form is provided. **{Provide copies of all 2020 IRS W-2 forms issued to the parent by their employers}. 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 the student’s name and ID number at the top.

| Employer’s Name | 2020 Amount Earned | IRS W-2 Provided? |
|-----------------|--------------------|-------------------|
| | | |
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*****Please Note: We may require you to provide documentation from the IRS that indicates a 2020 IRS income tax return was not filed with the IRS.**

SECTION E: SIGNATURES

Certification and Signature: Each person signing below certifies that all of the information reported is complete and correct. I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail, or both.

Print Student's Name

Student's ID Number

Student's Signature (Required)

Date

Parent Signature (Required)

Date

Note: Students and parents must have a separate signature – and cannot sign federal financial aid documents for each other.

SECTION F: IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE

Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at _____ to verify his or her identity by
(Name of Postsecondary Educational Institution)

presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Identity and Statement of Educational Purpose (To Be Signed in the Presence of a Notary)

If the student is unable to appear in person at _____ to verify his or her identity,
(Name of Postsecondary Educational Institution)

the student must provide to the notary:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

(Student) Statement of Educational Purpose

I certify that I, _____, am the individual signing this Statement of Educational
(Print Student's Name)

Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to

pay the cost of attending _____ for 2022–2023.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Student's ID Number)

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Notary's Certificate of Acknowledgement
Notary's certification may vary by State

State of _____

City/County of _____

On _____, before me, _____,
(Date) (Notary's name)

personally appeared, _____, and proved to me on the basis of satisfactory
(Printed name of signer)

on the basis of satisfactory evidence of identification _____
(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary signature)

My commission expires on _____

FOR OFFICE OF FINANCIAL AID USE ONLY: *Attach photocopy of ID after verifying identity.*

Document Used _____ Document Expiration Date _____

Date Received _____ ABC Official Signature/Title _____