

### 2020-2021 Required Tax Documents to Complete Verification

Please submit pages 3 and 4 of this document along with tax information listed below.

**Priority Deadline: Return by June 1, 2020 for maximum aid consideration.**

Parents		Students		
Parents who <b>FILED</b> a 2018 Tax Return	Parents who earned income but <b>WERE NOT</b> required <b>BY LAW</b> to file a 2018 Tax Return	Student who <b>FILED</b> a 2018 Tax Return	Student who earned income for 2018 but <b>WAS NOT</b> required <b>BY LAW</b> to file taxes for the year 2018	Student who <b>DID NOT</b> earn income for 2018
2018 IRS Tax Return Transcript <b>OR</b> Use of the IRS Data Retrieval Tool <b>(See Below)</b> <b>OR</b> Signed copy of filed 2018 federal Tax Return, including all schedules	IRS Form W-2 for each source of 2018 employment income received <b>OR</b> 2018 Wage and Income Transcript obtained through the IRS <b>AND</b> IRS Verification of 2018 Non-Filing Letter dated on or after October 1 <sup>st</sup> , 2019 <b>(See Page 2)</b>	2018 IRS Tax Return Transcript <b>OR</b> Use of the Data Retrieval Tool <b>(See Below)</b> <b>OR</b> Signed copy of filed 2018 federal Tax Return, including all schedules	IRS Form W-2 for each source of 2018 employment income received <b>OR</b> 2017 Wage and Income Transcript obtained through the IRS <b>(See Page 2)</b>	Completed Federal Verification Worksheet <b>(Pages 3 &amp; 4)</b>

**Tax Document – Option #1 (preferred). Use the IRS Data Retrieval Tool (DRT) on the FAFSA:**

**Parents who file Married Filing Jointly, Single, or Head of Household can use the DRT.**

**Log in at FAFSA.gov:**

1. As a returning FAFSA filer, select the “Login” button.
2. Log in using the student’s FSA ID and password.
3. Click on “Make FAFSA Corrections.”
4. Create a transaction “Save Key” and click “Next.”

**Parent/Student IRS DRT (complete for parent and student):**

1. Go to the “Financial Information” tab– parent or student.
2. Make sure that the status of the tax return is marked as “Already Completed.”
3. You will be presented with a series of questions to determine whether the parent(s)/student are eligible for the IRS DRT.
4. If eligible, click “Link to IRS” to be transferred to the IRS database. Enter the parent or student FSA ID and password.
5. Enter the address information exactly as it appears on your tax return. Click “Submit.”
6. Check the “Transfer My Tax Information into the FAFSA” box.
7. Click the “Transfer Now” button. You will be redirected back to the FAFSA.

**Tax Document Option #2. Requesting an IRS Tax Return Transcript.**

**If you use this option write the student’s name and ID on the transcript before submitting it to our office.**

- IRS Online Tax Return Transcript Request      <https://www.irs.gov/individuals/get-transcript>
- IRS Automated Phone Transcript Service      1-800-908-9946

**Tax Document – Option #3. Submit a signed copy of your filed 2018 federal Tax Return along with all schedules.**

## Additional Information for Special Tax Filing Situations

### Parent(s) not required to file a federal tax return provide the following for each Non-filer:

1. A copy of IRS Form W-2 for each source of 2018 employment income received (or an equivalent document such as the Wage and Income Transcript). Wage and Income Transcripts can be obtained at [www.irs.gov/individuals/gettranscript](http://www.irs.gov/individuals/gettranscript); **and**
2. IRS Verification of 2018 Non-filing Letter dated on or after October 1, 2019.

An IRS Verification of Non-filing Letter can be obtained online using the [IRS Get Transcript service](#). If the individual cannot obtain it online, you must request it by mail. Check box 7 on the [IRS Form 4506-T](#), *Request for Transcript of Tax Return*, and mail it to the IRS. If appropriate, a similar confirmation from another taxation authority (e.g., a U.S. territory or a foreign government) is also acceptable.

### Individuals Who Filed an Amended 2018 IRS Income Tax Return, provide:

1. A transcript obtained from the IRS that lists 2018 tax account information of the tax filer(s); use of the IRS DRT on the FAFSA; or a signed copy of the filed 2018 tax return with all schedules;  
**AND**
2. A signed copy of the 2018 IRS Form 1040X that was filed with the IRS.

### Individuals required to file a 2018 IRS income tax return and were granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2018, provide:

1. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2018; **and**
2. Verification of nonfiling from the IRS dated on or after October 1, 2019; **and**
3. A copy of IRS Form W-2 for each source of 2018 employment income received or an equivalent document; **and**
4. If self-employed, a signed statement certifying the amount of AGI and U.S. income tax paid for tax year 2018.

### Individuals who were the victim of IRS tax-related identity theft are required to provide:

1. A 2018 Tax Return DataBase View (TRDBV) transcript obtained from the IRS;  
**AND**
2. A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.



## 2020-2021 Dependent Student Federal Verification Worksheet

Student's ID Number: \_\_\_\_\_ Email: \_\_\_\_\_

Student's

Full Legal Name: \_\_\_\_\_ , \_\_\_\_\_  
 (Please print clearly)                      Last    First    Middle

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) has been selected for federal verification. The Office of University Scholarships and Financial Aid will compare your FAFSA with the information on this form and with any other required documents. If there are differences between your FAFSA and verification documents, we will make the corrections electronically. If necessary, our office will request additional information. **Please do not make any on-line corrections to your FAFSA during this process.**

**Please include the student's name and Virginia Tech ID number on all pages submitted.**

### Household information

**Please read Steps 1 and 2 below thoroughly and carefully before completing the box below.**

1. **HOUSEHOLD:** List the people in your parent(s)' household in the chart below, including:
  - Yourself, even if you don't live with your parent(s); **AND**
  - Your parent(s), if your legal parent(s) (biological and/or adoptive) are not married to each other and live together provide information about both of them regardless of their gender; **AND**
  - Your parent(s) other children, even if they do not live with your parent(s), if your parent(s) will provide more than half of their support between July 1, 2020 and June 30, 2021, or the children would be required to provide parental information when applying for Federal Student Aid; **AND**
  - Other people if they now live with your parent(s), your parent(s) provide more than half of their support and your parent(s) will continue to provide more than half of their support between July 1, 2020 and June 30, 2021.
  
2. **NUMBER IN COLLEGE:** Include the name of the college for any household members, **excluding parent(s)**, who will be enrolled **at least half-time** in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2020 and June 30, 2021. Include additional pages if necessary to list each person in the household.

Full Name	Age <i>(Do not leave blank)</i>	Relationship to Student	College/University
1)	Age	Self	Virginia Tech
2)	Age		
3)	Age		
4)	Age		
5)	Age		
6)	Age		
7)	Age		

*Attach additional page(s) if necessary*

Student ID Number \_\_\_\_\_

Student Last Name \_\_\_\_\_

**STUDENT**

**Check the one that applies:**

<input type="checkbox"/>	I, the student, earned <b>NO</b> income in tax year 2018; I did not file taxes.
<input type="checkbox"/>	I, the student, used the IRS Data Retrieval Tool to transfer my 2018 tax information to my FAFSA, and did not change it.
<input type="checkbox"/>	I, the student, am providing a copy of my 2018 IRS Tax Return Transcript, or a signed copy of my filed 2018 federal Tax Return and all schedules.
<input type="checkbox"/>	I, the student, earned income for 2018, but was not required to file a Federal Tax Return. <ol style="list-style-type: none"> <li>1. I am providing copies of each W-2 for 2018.</li> <li>2. I have completed the Non-filers section for students below.</li> </ol>

**Student Non-tax filer Section (do not complete if you checked one of the first three boxes above)**

Name of Employer	2018 Amount Earned	W-2 Submitted
<i>FOR NON-FILERS ONLY</i>		

**PARENT(S)**

**Check the one that applies:**

<input type="checkbox"/>	Parent(s) used IRS Data Retrieval Tool to transfer parent(s) 2018 tax information to student's FAFSA, and did not change it.
<input type="checkbox"/>	Parent(s) is providing a copy of the 2018 IRS Tax Return Transcripts, or a signed copy of the filed 2018 federal Tax Return and all schedules.
<input type="checkbox"/>	Parent(s) earned <b>NO</b> income for 2018 and are not required to file a Federal Tax Return. <ol style="list-style-type: none"> <li>1. I have attached a 2018 IRS Verification of Non-Filing Letter dated on or after October 1<sup>st</sup>, 2019.</li> </ol>
<input type="checkbox"/>	Parent(s) earned income for 2018 but were not required to file a Federal Tax Return. <ol style="list-style-type: none"> <li>1. I am providing copies of W-2s for each source of income for 2018.</li> <li>2. I have attached a 2018 IRS Verification of Non-Filing Letter dated on or after October 1<sup>st</sup>, 2019.</li> <li>3. I have completed the Non-filers section for parent(s) below.</li> </ol>

**Parent Non-tax filer Section (do not complete if you checked one of the first three boxes above)**

Name of Employer	2018 Amount Earned	W-2 Submitted
<i>FOR NON-FILERS ONLY</i>		

Please be sure all information is complete and include all signatures. **Electronic signatures are not acceptable.** Make sure the student last name and ID number are clearly indicated on the top of each page.

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

**Student Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
*No Electronic Signatures*

**Parent Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
*No Electronic Signatures*

For the security of your personal information, the Virginia Tech Office of University Scholarships and Financial Aid does not accept completed forms sent via email. Please return completed forms to us via the document uploader, <https://finaid.vt.edu/documentuploader.html>, or by fax, 540-231-9139.