

2020-2021 Required Tax Documents to Complete Verification

Please submit page 3 of this document along with tax information listed below.

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

Parents

Parents who filed a 2018 Tax Return

Parents who earned income but were
NOT required **BY LAW** to file a 2018 Tax Return

2018 IRS Tax Return Transcript
OR
Use the IRS Data Retrieval Tool to transfer tax information
(See Below)
OR
Signed copy of filed 2018 federal Tax Return, including all schedules

IRS Form W-2 for each source of 2018 employment income received
OR
2018 Wage and Income Transcript obtained through the IRS
AND
IRS Verification of 2018 Non-Filing Letter dated on or after October 1st, 2019
(See Page 2)

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

1. Go to the "Financial Information" tab– parent.
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) are eligible for the IRS DRT.
4. If eligible, click "Link to IRS" to be transferred to the IRS database. Enter the parent 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 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;
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 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.

For an individual who was the victim of IRS tax-related identity theft:

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 (Auto-Zero)

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.**

PARENT(S)

Check the one that applies:

<input type="checkbox"/>	Parent(s) used IRS Data Retrieval Tool to transfer parents 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 NO income for 2018 and are not required to file a Federal Tax Return. 1. I have attached an IRS Verification of 2018 Non-Filing Letter dated on or after October 1 st , 2019.
<input type="checkbox"/>	Parent(s) earned income for 2018 but was not required to file a Federal Tax Return 1. I am providing copies of W-2's for each source of income for 2018. 2. I have attached a 2018 IRS Verification of Non-Filing Letter dated on or after October 1 st , 2019. 3. I have completed the Non-Filers section for parents below.

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.

**2020-2021
High School Completion Status**

Student ID Number: _____ Email: _____

Student's

Full Legal Name:

(Please print clearly)

Last

First

Middle

Please provide one of the following documents that indicate the student's high school completion status at the time the student will begin college in 2020-2021:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript received by a student after the student passed a State-authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "Secondary School Leaving Certificate" or other similar document if a copy of the high school diploma or transcript is unavailable.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a homeschooled student in a state where the law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), please provide a copy of that credential.
- For a homeschooled student in a state where the law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.
- A copy of the student's Certificate of Release or Discharge from Active Duty "DD214" indicating that the student is a high school graduate or equivalent.

If you purposely give false or misleading information, you may receive a fine, a prison sentence, or both. By signing this form, I certify that all information is complete and correct.

Student Signature: _____**Date:** _____**Electronic signatures are not allowed****Parent Signature:** _____**Date:** _____**Electronic signatures are not allowed**

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**2020-2021 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 Virginia Tech to verify his or her identity, the student must provide:

- a) A copy of an unexpired valid government-issued photo identification such as, but not limited to, a driver's license, other state-issued photo identification, or U.S. passport that is acknowledged in the notary statement or that is presented to a notary; **and**
- b) An original notarized Statement of Educational Purpose, which is provided below, 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.

Statement of Educational Purpose	
I certify that I _____ am the individual signing this (Print Student's Name)	
Statement of Educational 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 Virginia Tech for 2020-2021.	
Student Signature: _____	Date: _____
Student ID Number: _____	

Notary's Certificate of Acknowledgement (for use only if unable to appear in person)	
State of _____	City/County of _____
On _____ before me,	_____
(Date)	(Notary's Name)
personally appeared, _____	and provided to me on basis of
(Printed name of signer)	
satisfactory evidence of identification _____	(Type of government-issued photo ID provided)
to be the above-named person who signed the foregoing instrument. WITNESS my hand and official seal (seal)	
_____ My commission expires on _____	(Date)
(Notary Signature)	

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