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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.

Student & Spouse (if married)

Student **who FILED** a 2018 Tax Return	Student who earned income for 2018 but **WAS NOT** required **BY LAW** to file taxes for the year 2018	Student who **DID NOT** earn income for 2018
2017 IRS Tax Return Transcript **OR** Use of the FAFSA Data Retrieval Tool **(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 **(See Page 2)** **AND** IRS Verification of 2018 Non-Filing Letter dated on or after October 1st, 2019 **(See Page 2)**	Completed Federal Verification Worksheet **(Pages 3 & 4)** **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:
   Those 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."
  Student IRS DRT:
 1. Go to the "Financial Information" tab– 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 you are eligible for the IRS DRT.
 4. If eligible, click "Link to IRS" to be transferred to the IRS database. Enter your 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.

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Additional Information for Special Tax Situations

Student & Spouse (if married) not required to file a federal tax return MUST 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 one 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

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2020-2021
Independent Student 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 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 household, including:**
   - Yourself (and your spouse, if you are married); **AND**
   - Your children, if you will provide more than half of their support, even if they do not live in your house, between July 1, 2020 and June 30, 2021, **AND**
   - Other people if they now live with you, you provide more than half of their support and you 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 who will be enrolled <u>at least half time</u> in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2020 and June 30, 2021.**

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

Attach additional page(s) if necessary

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#

_____   _____
Student ID Number   Student Last Name

STUDENT

Check the one that applies:

	I earned **NO** income in tax year 2018; I did not file taxes. 1. I am providing a 2018 IRS Verification of Non-filing Letter dated on or after October 1, 2019.
	I used the IRS Data Retrieval Tool to transfer my 2018 Tax Information to my FAFSA, and did not change it.
	I am providing a copy of my 2018 IRS Tax Transcript, or a signed copy of my filed 2018 federal Tax Return and all schedules.

	I earned income for 2018 but was not required to file a Federal Tax Return.
	   1. I am providing a 2018 IRS Verification of Non-filing Letter dated on or after October 1, 2019.
	   2. I am providing copies of each W-2 for 2018.
	   3. I have completed the Non-Filers section for students below.

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

Check the one that applies:
SPOUSE *(IF APPLICABLE, IF NOT MARRIED LEAVE BLANK)*

	I earned **NO** income in tax year 2018; I did not file taxes. 1. I am providing a 2018 IRS Verification of Non-filing Letter dated on or after October 1, 2019.
	I used the IRS Data Retrieval Tool to Transfer my 2018 Tax Information to my FAFSA, and did not change it.
	I 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.

	I earned income for 2018 but was not required to file a Federal Tax Return.
	   1. I am providing a 2018 IRS Verification of Non-filing Letter dated on or after October 1, 2019.
	   2. I am providing copies of each W-2 for 2018.
	   3. I have completed the Non-Filers section for students below.

Spouse 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

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

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.

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2020-2021
High School Completion Status

Student ID Number: _____   Email: _____

Full Legal Name:

| (**Please print clearly**) | **Last** | **First** | **Middle** |

Please provide <u>one</u> 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** _____
         No Electronic Signature

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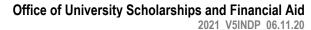
2020-2021
Identity and Statement of Educational Purpose
(To Be Signed at the Institution)

Student ID Number: _____   Email: _____

Student's
Full Legal Name: _____ , _____   _____
(**Please print clearly**)   **Last**   **First**   **Middle**

The student must appear in person at Virginia Tech to verify his or her identity by presenting 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. 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 collect the student's ID.

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

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: _____

USFA Witness Signature: _____   Date: _____

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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 <u>unable to appear in person</u> 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 _____

_____   _____
(Notary Signature)   (Date)

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