

**2021-2022  
Marital Status/Tax Filing Worksheet for  
Students  
Instruction Sheet**

**Priority Deadline:**  
Returning Students: Return by **April 1, 2021**  
for maximum aid consideration  
New Students: Return by **June 1, 2021** for  
maximum aid consideration.

The information you provide will be compared to the Free Application for Federal Student Aid (FAFSA). If there are differences, our office will submit corrections to your FAFSA electronically. This instruction sheet is for you to keep for your records.

In the first section of this form, you, the student, will confirm your marital status and the date this status became effective.

In the next section of the form, you, the student, will clarify your tax filing status. You must submit your 2019 **federal tax return transcript** or a **signed** copy of your 2019 federal tax return (1040), including all schedules, that you filed with the IRS. The remainder of the form collects and clarifies federal tax return information.

Below are a couple of options for requesting a transcript. It may take up to two weeks for IRS income information to be available for electronic IRS tax return filers and six to eight weeks for paper IRS tax return filers.

**IRS Online Tax Return Transcript Request:** <http://www.irs.gov/Individuals/Get-Transcript>

**IRS Automated Phone Transcript Service:** **1-800-908-9946**

**If you and or your spouse (if applicable) are not required by law to file a federal tax return you will need to provide the following:**

1. A copy of IRS Form W-2 for each source of 2019 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/get-transcript](http://www.irs.gov/individuals/get-transcript); **and**
2. IRS Verification of 2019 Non-filing Letter dated on or after October 1, 2020.

An IRS Verification of Non-filing Letter can be obtained online using the **IRS Get Transcript service**. If the individual cannot obtain one online, it must be requested 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.

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.





Other Income	Sch. 1 Line 8	\$
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Tax Return Item Adjusted Gross Income Section	1040 Line Number	Amount Attributed to the Student
Educator Expense	Sch. 1 Line 10	\$
Business Expenses	Sch. 1 Line 11	\$
Health Savings Account Deduction	Sch. 1 Line 12	\$
Moving Expenses	Sch. 1 Line 13	\$
Deductible part of Self Employment Tax	Sch. 1 Line 14	\$
Self-Employed SEP, SIMPLE plans	Sch. 1 Line 15	\$
Self-Employed Health Insurance Plans	Sch. 1 Line 16	\$
Penalty on Early Withdrawal of Savings	Sch. 1 Line 17	\$
Alimony Paid	Sch. 1 Line 18a	\$
IRA Deduction	Sch. 1 Line 19	\$
Student Loan Interest Deduction	Sch. 1 Line 20	\$

Tax, Credits, and Payments	1040 Line Number	Amount Attributed to the Student
Education Credits from Form 8863, line 19	Sch. 3 Line 3	\$

Asset Information (as of the date you filed the FAFSA)	Student Amount (whole dollars only)	Spouse (if applicable) (whole dollars only)
Balance of Cash, Savings, and Checking	\$	\$
Net worth of Investments ( <i>Value minus debt = current net worth</i> )	\$	\$
Net worth of Business and/or Farm ( <i>Value minus debt = current net worth</i> )	\$	\$

**Additional Comments (optional):** (please use this space to provide any explanation of the figures provided above)

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** \_\_\_\_\_  
Electronic signature is not allowed

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