

**2021-2022 Required Tax Documents to Complete Verification**

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

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

**New Students: Return by June 1, 2021 for maximum aid consideration.**

**Student & Spouse (if married)**

Student who <b>FILED</b> a 2019 Tax Return	Student who earned income for 2019 but <b>WAS NOT</b> required <b>BY LAW</b> to file taxes for the year 2019	Student who <b>DID NOT</b> earn income for 2019
2019 IRS Tax Return Transcript <b>OR</b> Use of the FAFSA Data Retrieval Tool <b>(See Below)</b> <b>OR</b> Signed copy of filed 2019 federal Tax Return, including all schedules	IRS Form W-2 for each source of 2019 employment income received <b>OR</b> 2019 Wage and Income Transcript obtained through the IRS <b>(See Page 2)</b> <b>AND</b> IRS Verification of 2019 Non-Filing Letter dated on or after October 1 <sup>st</sup> , 2020 <b>(See Page 2)</b>	Completed federal Verification Worksheet <b>(Pages 3 &amp; 4)</b> <b>AND</b> IRS Verification of 2019 Non-Filing Letter dated on or after October 1 <sup>st</sup> , 2020 <b>(See Page 2)</b>

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

Those 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 “Log In” 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 2019 federal Tax Return along with all schedules.**

## Additional Information for Special Tax Filing Situations

**Student & Spouse (if married) who are 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 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/gettranscript](http://www.irs.gov/individuals/gettranscript);  
**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 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 2019 IRS Income Tax Return, provide:**

1. A transcript obtained from the IRS that lists 2019 tax account information of the tax filer(s); use of the IRS DRT on the FAFSA; or a signed copy of the filed 2019 tax return with all schedules;  
**AND**
2. A signed copy of the 2019 IRS Form 1040X that was filed with the IRS.

### **Individuals required to file a 2019 IRS income tax return and were granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2019, provide:**

1. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019; **and**
2. IRS Verification of 2019 Non-filing Letter dated on or after October 1, 2020; **and**
3. A copy of IRS Form W-2 for each source of 2019 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 2019.

### **For an individual who was the victim of IRS tax-related identity theft, provide:**

1. A 2019 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.



## 2021-2022 Independent Student Verification Worksheet

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

Student's Full Legal Name: \_\_\_\_\_  
 (Please print clearly)                      Last                                      First                                      Middle

Your 2021-2022 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, 2021 and June 30, 2022, **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, 2021 and June 30, 2022.

**2. NUMBER IN COLLEGE:** Include the name of the college for any household members 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, 2021 and June 30, 2022.

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		
8)	Age		

*Attach additional page(s) if necessary*

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

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

**STUDENT**

**Check the one that applies:**

<input type="checkbox"/>	I earned <b>NO</b> income in tax year 2019; I did not file taxes. 1. I am providing a 2019 IRS Verification of Non-filing Letter dated on or after October 1, 2020.
<input type="checkbox"/>	I used the IRS Data Retrieval Tool to transfer my 2019 Tax Information to my FAFSA, and did not change it.
<input type="checkbox"/>	I have provided a copy of my 2019 IRS Tax Return Transcript, or a signed copy of my filed 2019 federal Tax Return and all schedules.
<input type="checkbox"/>	I earned income for 2019 but was not required to file a Federal Tax Return. 1. I am providing a 2019 IRS Verification of Non-filing Letter dated on or after October 1, 2020. 2. I am providing copies of each W-2 for 2019. 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	2019 Amount Earned	W-2 Submitted
<i>FOR NON FILERS ONLY</i>		

**Check the one that applies:**

**SPOUSE (IF APPLICABLE, IF NOT MARRIED LEAVE BLANK)**

<input type="checkbox"/>	I earned <b>NO</b> income in tax year 2019; I did not file taxes. 1. I am providing a 2019 IRS Verification of Non-filing Letter dated on or after October 1, 2020.
<input type="checkbox"/>	I used the IRS Data Retrieval Tool to Transfer my 2019 Tax Information to my FAFSA, and did not change it.
<input type="checkbox"/>	I have provided a copy of my 2019 IRS Tax Return Transcript, or a signed copy of my filed 2019 federal Tax Return and all schedules.
<input type="checkbox"/>	I earned income for 2019 but was not required to file a Federal Tax Return. 1. I am providing a 2019 IRS Verification of Non-filing Letter dated on or after October 1, 2020. 2. I am providing copies of each W-2 for 2019. 3. I have completed the Non-Filers section for spouses below.

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

Name of Employer	2019 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*

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.