

2022-2023 Required Tax Documents to Complete Verification

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

Priority Deadline: Returning Students: Return by April 1, 2022 for maximum aid consideration.

New Students: Return by June 1, 2022 for maximum aid consideration.

Student & Spouse (if married)

Student who **FILED** a 2020 Tax Return

Student who earned income for 2020 but **WAS NOT** required **BY LAW** to file taxes for the year 2020

Student who **DID NOT** earn income for 2020

2020 IRS Tax Return Transcript
OR
Use of the FAFSA Data Retrieval Tool
(See Below)
OR
Signed copy of filed 2020 federal Tax Return, including all schedules

IRS Form W-2 for each source of 2020 employment income received
OR
2020 Wage and Income Transcript obtained through the IRS
(See Page 2)
AND
IRS Verification of 2020 Non-Filing Letter dated on or after October 1st, 2021
(See Page 2)

Completed Federal Verification Worksheet
(Page 3)
AND
IRS Verification of 2020 Non-Filing Letter dated on or after October 1st, 2021
(See Page 2)

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 2020 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 2020 Non-filing Letter dated on or after October 1, 2021.

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 2020 IRS Income Tax Return, provide:

1. A transcript obtained from the IRS that lists 2020 tax account information of the tax filer(s); use of the IRS DRT on the FAFSA; or a signed copy of the filed 2020 tax return with all schedules;
AND
2. A signed copy of the 2020 IRS Form 1040X that was filed with the IRS.

Individuals required to file a 2020 IRS income tax return and were granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2020, provide:

1. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2020; **and**
2. IRS Verification of 2020 Non-filing Letter dated on or after October 1, 2021; **and**
3. A copy of IRS Form W-2 for each source of 2020 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 2020.

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

1. A 2020 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.



2022-2023

Independent Student Federal Verification Worksheet

Student ID Number: _____ Email: _____

Student's

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

Your 2022-2023 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 online corrections to your FAFSA during this process.

STUDENT

Check the one that applies:

Table with 2 columns: Selection box, Description of tax filing status (e.g., I earned NO income in tax year 2020; I did not file taxes. I used the IRS Data Retrieval Tool to transfer my 2020 Tax Information to my FAFSA, and did not change it.)

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

Table with 3 columns: Name of Employer, 2020 Amount Earned, W-2 Submitted. Includes watermark: FOR NON FILERS ONLY

SPOUSE (IF APPLICABLE, IF NOT MARRIED LEAVE BLANK)

Check the one that applies:

Table with 2 columns: Selection box, Description of tax filing status (e.g., I earned NO income in tax year 2020; I did not file taxes. I used the IRS Data Retrieval Tool to Transfer my 2020 Tax Information to my FAFSA, and did not change it.)

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

Table with 3 columns: Name of Employer, 2020 Amount Earned, W-2 Submitted. Includes watermark: FOR NON FILERS ONLY

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 or typed 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.