

### 2022-2023 Required Tax Documents to Complete Verification

Please submit pages 3 through 5 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 1<sup>st</sup>, 2021  
**(See Page 2)**

Completed Federal Verification Worksheet  
**(Page 3)**  
**AND**  
 IRS Verification of 2020 Non-Filing Letter dated on or after October 1<sup>st</sup>, 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 2020 federal Tax Return along with all schedules.

## 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 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](http://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 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 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 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:**

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:

|                          |  |
|--------------------------|--|
| <input type="checkbox"/> | I earned <b>NO</b> income in tax year 2020; I did not file taxes.<br>1. I am providing a 2020 IRS Verification of Non-filing Letter dated on or after October 1, 2021.   |
| <input type="checkbox"/> | I used the IRS Data Retrieval Tool to transfer my 2020 Tax Information to my FAFSA, and did not change it.   |
| <input type="checkbox"/> | I have provided a copy of my 2020 IRS Tax Return Transcript, or a signed copy of my filed 2020 federal Tax Return and all schedules.   |
| <input type="checkbox"/> | I earned income for 2020 but was not required to file a Federal Tax Return.<br>1. I am providing a 2020 IRS Verification of Non-filing Letter dated on or after October 1, 2021.<br>2. I am providing copies of each W-2 for 2020.<br>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    | 2020 Amount Earned | W-2 Submitted |
|---------------------|--------------------|---------------|
| FOR NON FILERS ONLY |                    |               |

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

Check the one that applies:

|                          |   |
|--------------------------|---|
| <input type="checkbox"/> | I earned <b>NO</b> income in tax year 2020; I did not file taxes.<br>1. I am providing a 2020 IRS Verification of Non-filing Letter dated on or after October 1, 2021.  |
| <input type="checkbox"/> | I used the IRS Data Retrieval Tool to Transfer my 2020 Tax Information to my FAFSA, and did not change it.  |
| <input type="checkbox"/> | I have provided a copy of my 2020 IRS Tax Return Transcript, or a signed copy of my filed 2020 federal Tax Return and all schedules.  |
| <input type="checkbox"/> | I earned income for 2020 but was not required to file a Federal Tax Return.<br>1. I am providing a 2020 IRS Verification of Non-filing Letter dated on or after October 1, 2021.<br>2. I am providing copies of each W-2 for 2020.<br>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    | 2020 Amount Earned | W-2 Submitted |
|---------------------|--------------------|---------------|
| 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.



2022-2023
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 2022-2023.
Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_
Student ID Number: \_\_\_\_\_

USFA Witness Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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## 2022-2023 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.

| <b>Statement of Educational Purpose</b>   |             |
|---|-------------|
| I certify that I _____ am the individual signing this<br><div style="text-align: center; margin-left: 100px;">(Print Student's Name)</div>  |             |
| 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 2022-2023. |             |
| Student Signature: _____  | Date: _____ |
| Student ID Number: _____  |             |

| <b>Notary's Certificate of Acknowledgement (for use only if unable to appear in person)</b>                |   |
|--|---|
| 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. <b>WITNESS</b> my hand and official seal |   |
|  | (seal)  |
| _____  | My commission expires on _____                |
| (Notary Signature)   | (Date)  |

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