

2024-2025 Required Tax Documents to Complete Verification				
Please submit page 3 of this document along with tax information listed below.				
Parents		Students		
Parents who <b>FILED</b> a 2022 Tax Return	Parents who earned income but <b>WERE NOT</b> required <b>BY LAW</b> to file a 2022 Tax Return	Student who <b>FILED</b> a 2022 Tax Return	Student who earned income for 2022 but <b>WAS NOT</b> required <b>BY LAW</b> to file taxes for the year 2022	Student who <b>DID NOT</b> earn income for 2022
2022 IRS Tax Return Transcript <b>OR</b> IRS Direct Data Exchange (DDX) <b>(See Below)</b> <b>OR</b> Signed copy of filed 2022 Federal Tax Return, including all schedules if applicable	IRS Form W-2 for each source of 2022 employment income received <b>OR</b> 2022 Wage and Income Transcript obtained through the IRS <b>AND</b> IRS Verification of 2022 Non-Filing Letter dated on or after October 1 <sup>st</sup> , 2023 <b>(See Page 2)</b>	2022 IRS Tax Return Transcript <b>OR</b> Use of the Data Retrieval Tool <b>(See Below)</b> <b>OR</b> Signed copy of filed 2022 federal Tax Return, including all schedules	IRS Form W-2 for each source of 2022 employment income received <b>OR</b> 2022 Wage and Income Transcript obtained through the IRS <b>(See Page 2)</b>	Completed Federal Verification Worksheet <b>(Page 3)</b>

**Tax Document – Option #1 (preferred). Use IRS Direct Data Exchange (DDX) on the FAFSA:**

As part of Federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

**Tax Document – Option #2. Requesting a 2022 IRS Tax Return Transcript if info was not transferred via FA-DDX and considered verified:**

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 (generally received within 10 business days)
- Get Transcript by Mail      <https://www.irs.gov/individuals/get-transcript> (click get by mail)
- Paper Request Form      IRS Form 4506T-EZ or IRS Form 4506-T

**Tax Document – Option #3. Submit a signed copy of your filed 2022 Federal Tax Return along with all schedules.**

## Additional Information for Special Tax Filing Situations

### Parent(s) not required to file a federal tax return provide the following for each Non-filer:

1. A copy of IRS Form W-2 for each source of 2022 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 2022 Non-filing Letter dated on or after October 1, 2023.

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 2022 IRS Income Tax Return provide:

1. A transcript obtained from the IRS that lists 2022 tax account information of the tax filer(s); use of the IRS DDX on the FAFSA; or a signed copy of the filed 2022 tax return with all schedules;  
**AND**
2. A signed copy of the 2022 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.
3. A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS

### Individuals required to file a 2022 IRS income tax return and were granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022, must provide:

1. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022; **and**
2. A signed statement listing the sources of any 2022 income and the amount of income from each source; **and**
3. A copy of IRS Form W-2 for each source of 2022 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 2022.

### Individuals who were the victim of IRS tax-related identity theft are required to provide:

1. A 2022 Tax Return DataBase View (TRDBV) transcript obtained from the IRS, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with 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.

### Individuals Who Filed Non-IRS Income Tax Returns

1. A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

**2024-2025**

**Dependent Student Federal Verification Worksheet**

Student ID Number: \_\_\_\_\_ Email: \_\_\_\_\_

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

Your 2024-2025 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, the student, earned <b>NO</b> income in tax year 2022; I did not file taxes.
<input type="checkbox"/>	I, the student, used the IRS Direct Data Exchange (FA-DDX) when completing the FAFSA.
<input type="checkbox"/>	I, the student, am providing a copy of my 2022 IRS Tax Return Transcript, or a signed copy of my filed 2022 federal Tax Return and all schedules.
<input type="checkbox"/>	I, the student, earned income for 2022, but was not required to file a Federal Tax Return. <ol style="list-style-type: none"> <li>1. I am providing copies of each W-2 for 2022.</li> <li>2. I have completed the Non-filers section for students below.</li> </ol>

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

Name of Employer	2022 Amount Earned	W-2 Submitted

**PARENT(S)**

**Check the one that applies:**

<input type="checkbox"/>	Parent(s) used the IRS Direct Data Exchange (FA-DDX) to transfer parent(s) 2022 tax information to student's FAFSA, and did not change it.
<input type="checkbox"/>	Parent(s) is providing a copy of the 2022 IRS Tax Return Transcripts, or a signed copy of the filed 2022 federal Tax Return and all schedules.
<input type="checkbox"/>	Parent(s) earned <b>NO</b> income for 2022 and are not required to file a Federal Tax Return. <ol style="list-style-type: none"> <li>1. I have attached a 2022 IRS Verification of Non-Filing Letter dated on or after October 1<sup>st</sup>, 2023.</li> </ol>
<input type="checkbox"/>	Parent(s) earned income for 2022 but were not required to file a Federal Tax Return. <ol style="list-style-type: none"> <li>1. I am providing copies of W-2s for each source of income for 2022.</li> <li>2. I have attached a 2022 IRS Verification of Non-Filing Letter dated on or after October 1<sup>st</sup>, 2023.</li> <li>3. I have completed the Non-filers section for parent(s) below.</li> </ol>

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

Name of Employer	2022 Amount Earned	W-2 Submitted

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

**Parent 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>.