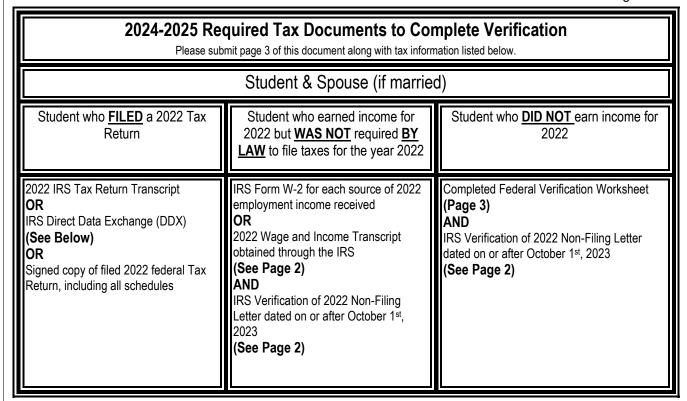


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### Tax Document - Option #1 (preferred). Use IRS Direct Data Exchange (DDX) on the FAFSA:

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As part of Federal student aid eligibility, students 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 married students 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.

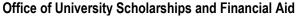
IRS Online Tax Return Transcript Request https://www.irs.gov/individuals/get-transcript

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.



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### **Additional Information for Special Tax Filing Situations**

# Student & Spouse (if married) who are not required to file a federal tax return <u>MUST</u> provide the following for EACH Non-filer:

 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;

AND

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:

- 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;
- 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, provide:

- 1. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022; and
- 2. IRS Verification of 2022 Non-filing Letter dated on or after October 1, 2023; 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.

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

 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:**

 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.



### Office of University Scholarships and Financial Aid

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## 2024-2025 Independent Student Verification Worksheet

Student ID Number:		Email:		
Student's				
Full Legal Name: (Please print clearly)	Last		st Middle	
(Flease print clearly)		Firs	st widdle	
and Financial Aid will compare	your FAFSA with cuments, we will	the information on this form and with any other make the corrections electronically. If necessary	deral verification. The Office of University Scholarships er required documents. If there are differences between ary, our office will request additional information. Please	
Check the one that applies:		<u>STUDENT</u>		
I earned NO income in		not file taxes.		
	1. I am providing a 2022 IRS Verification of Non-filing Letter dated on or after October 1, 2022.			
I used the IRS Direct Da	ata Exchange (FA-I	DDX) to transfer my 2022 Tax Information to my FA	FSA, and did not change it.	
I have provided a copy	of my 2022 IRS Tax	Return Transcript, or a signed copy of my filed 20	22 federal Tax Return and all schedules.	
I earned income for 202	22 but was not requi	red to file a Federal Tax Return.		
	5 m m m m m m m m m m m m m m m m m m m			
3. I have com	pleted the Non-File	rs section for students below.		
Stu	udent Non-tax file	r Section (do not complete if you checked one	e of the first three boxes above)	
Name of Employer		2022 Amount Earned	W-2 Submitted	
-				
Check the one that applies:  I earned NO income in  1. I am provi	n tax year 2022; I did	d not file taxes. rification of Non-filing Letter dated on or after Octol	·	
		DDX) to Transfer my 2022 Tax Information to my F		
I have provided a copy	I have provided a copy of my 2022 IRS Tax Return Transcript, or a signed copy of my filed 2022 federal Tax Return and all schedules.			
1. I am provi 2. I am provi	ding a 2022 IRS Ve ding copies of each	uired to file a Federal Tax Return. rification of Non-filing Letter dated on or after Octol W-2 for 2022. ers section for spouses below.	ber 1, 2023.	
Spouse N	Non-tax filer Sec	ction (do not complete if you checked one	e of the first three boxes above)	
Name of Emplo	oyer	2022 Amount Earned	W-2 Submitted	
f I purposely give false or misleading in complete and correct.	oformation on this work	ssheet, I may receive a fine, a prison sentence, or both. B	by signing this information request, I am certifying that all information is	
Student Signature:		Date:		
_	No electr	onic or typed signatures		
			Scholarships and Financial Aid does not accept	

completed forms sent via email. Please return completed forms to us via the document uploader, <a href="https://finaid.vt.edu/documentuploader.html">https://finaid.vt.edu/documentuploader.html</a>,