

2023-2024 Verification of 2021 Income for Independent Student Tax Filer

Student Income Verification

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the Financial Aid Office if the student or spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the student and spouse filed or will file a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at www.fafsa.gov.* In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA once the 2021 IRS income tax return has been filed.

If the student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Income Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules must be provided for each.

- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.

A 2021 IRS Tax Return Transcript may be obtained free of charge through:

Online Request – Go to www.irs.gov and select “Get Your Tax Record” to access the **Get Transcript** process. Make sure to request the **“IRS Tax Return Transcript”** and **NOT** the “IRS Tax Account Transcript.”

Telephone Request – 1-800-908-9946

Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

- Check here if a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules are provided.
- Check here if a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules will be provided later.

Certification and Signatures

Signing this worksheet certifies that all of the information reported on it is complete and correct.

The student must sign and date this form.

Print Student's Name

Student's ID Number

Student's Signature

Date