

Student's Name: _____ Mustangs ID: _____

C. Independent STUDENT'S Income Information to Be Verified

1. **TAX RETURN FILERS—Important Note:** The instructions below apply to the student and spouse, if married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

Instructions: Complete this section if the student and spouse filed or will file a 2020 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 FAFSA.gov. In most cases, no further documentation is needed to verify 2020 IRS income tax return 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/spouse has used the IRS DRT in FAFSA on the Web to transfer 2020 IRS income tax return information into the student's FAFSA.
- The student/spouse has not yet used the IRS DRT in FAFSA on the Web, but will use the DRT to transfer 2020 IRS income tax return information into the student's FAFSA once the 2020 IRS income tax return has been filed.
- The student/spouse is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a **2020 IRS Tax RETURN Transcript(s)**.

A 2020 IRS Tax Return Transcript may be obtained through:

- Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading, click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.”
- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click “Get Your Tax Record.” Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.”
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

If the student and spouse filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the 2020 IRS Tax Return Transcripts must be provided for both. *Verification cannot be completed until the IRS Tax Return Transcript(s) has been submitted to the school.*

- Check here if a **2020 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2020 IRS Tax Return Transcript(s)** will be provided later.

2. **TAX RETURN NON-FILERS**—The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2020 income tax return with the IRS. **Check the box that applies:**

- The student and spouse were not employed and had no income earned from work in 2020.
- The student and/or spouse were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. Provide copies of all 2020 IRS W-2 forms issued to the student and spouse by their employers. List every employer even if the employer did not issue an IRS W-2 form. **If more space is needed, provide a separate page with the student's name and ID number at the top.**

Employer's Name <i>Joe's Auto Body Shop (example)</i>	2020 Amount Earned <i>\$2,000.00 (example)</i>	IRS W-2 Provided? <i>Yes (example)</i>

3. *Student nontax filers OR tax filers who received an extension who still have not filed their 2020 income tax return must provide confirmation of non-filing DATED ON/AFTER OCTOBER 1, 2021. Student confirmation of non-filing can be obtained from the IRS (www.irs.gov) using Form 4506-T (check Box 7) AND enter the date of 12/31/2020 (Box 9). If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.*

- Check here if confirmation of student non-filing is provided.
- Check here if confirmation of student non-filing will be provided later.

Student's Name: _____ Mustangs ID: _____

D. Verification of 2020 IRS Income Tax Return Information for Individuals with UNUSUAL CIRCUMSTANCES

FOR INFORMATIONAL PURPOSES:

- Individuals Granted a Filing Extension by the IRS: If an individual is required to file a 2020 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:
 - A copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2020;
 - A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2020;
 - Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2021;
 - A copy of IRS Form W-2 for each source of employment income received for tax year 2020 and,
 - If self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2020.

- Individuals Who Filed an Amended IRS Income Tax Return: If an individual filed an amended IRS income tax return for tax year 2020, provide the following:
 - **A 2020 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
 - A signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

- Individuals Who Were Victims of IRS Identity Theft must provide:
 - A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
 - A statement signed and dated by the tax filer indicating that he or she was victim of IRS tax-related identify theft and that the IRS is aware of the tax-related identify theft.

- Individuals Who Filed Non-IRS Income Tax Returns:
 - A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands 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.
 - A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
 - A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

E. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Print Student's Name

Mustangs ID

Student's Signature (Required)

Date

Spouse's Signature (Optional)

Date

***Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.***

You should make a copy of this worksheet for your records.