



**C. Verification of 2023 IRS Income Tax Return Information for Student Tax Filers**

**Instructions:** Complete this section if the student filed or will file a 2023 IRS income tax return(s). *The best way to verify income is by using the FUTURE Act Direct Data Exchange (FA-DDX) that transfers IRS federal tax information (FTI) to the FAFSA on the Web.* In most cases, no further documentation is needed to verify 2023 IRS income tax return information that was transferred into the student's FAFSA using the FA-DDX if that information was not changed by the FAFSA filer.

**Check the box that applies:**

Student has used the FA-DDX to directly import their 2023 IRS income tax return information into the student's FAFSA. **Must include W-2 Forms and applicable schedules.**

Student is unable or could not use the FA-DDX, and instead will provide the school a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return. Must include W-2 Forms and applicable schedules.**

A 2023 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), 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."
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), 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."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

Check here if a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 tax return, W-2 Forms and applicable schedules** is provided.

Check here if a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 tax return, W-2 Forms and applicable schedules** will be provided later.

**Verification of 2023 Income Information for Student Nontax Filers**

Complete this section if the student will not file and is not required to file a 2023 income tax return with the IRS.

**Check the box that applies:**

Student was not employed and had no income earned from work in 2023.

Student was employed in 2023 and has listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is provided. [Provide copies of all 2023 IRS W-2 forms issued to the student 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 student's ID number at the top.

Employer's Name	2023 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

**Foreign Country Non-tax Filers Only:** Provide documentation from a relevant tax authority other than the IRS that indicates a 2023 income tax return was not filed or a signed and dated statement from the student that they were not required to file a tax return for 2023.

Check here if confirmation of nonfiling is provided.

Check here if signed and dated statement is provided.

Student's Name \_\_\_\_\_ SSN: \_\_\_\_\_

**D. Verification of 2023 IRS Income Tax Return Information for Parent Tax Filers**

**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

**Instructions:** Complete this section if the parents filed or will file a 2023 IRS income tax return(s). The best way to verify income is by using the FUTURE Act Direct Data Exchange (FA-DDX) that transfers IRS federal tax information (FTI) to the FAFSA on the Web. In most cases, no further documentation is needed to verify 2023 IRS income tax return information that was transferred into the student's FAFSA using the FA-DDX if that information was not changed by the FAFSA filer.

**Check the box that applies:**

Parent(s) have used the FA-DDX to directly import their 2023 IRS income tax return information into the student's FAFSA. **Must include W-2 Forms and applicable schedules.**

Parent(s) are unable or could not use the FA-DDX in FAFSA, and instead will provide the school a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return. Must include W-2 Forms and applicable schedules.**

A 2023 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, 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."
- Get Transcript Online – Go to www.irs.gov, 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."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

If the parents filed separate 2023 IRS income tax returns, **2023 IRS Tax Return Transcripts or a signed copy of the 2023 income tax return and applicable schedules must be provided for each.**

Check here if a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 tax return, W-2 Forms and applicable schedules** is provided.

Check here if a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 tax return, W-2 Forms and applicable schedules** will be provided later.

**Verification of 2023 Income Information for Parent Nontax Filers**

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2023 income tax return with the IRS.

**Check the box that applies:**

One parent was not employed and had no income earned from work in 2023.

Neither parent was employed and had no income earned from work in 2023.

One or both parents were employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is provided. [Provide copies of all 2023 IRS W-2 forms issued to the parents 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 student's ID number at the top.

Employer's Name	2023 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

**Foreign Country Non-tax Filers Only:** Provide documentation from a relevant tax authority other than the IRS that indicates a 2023 income tax return was not filed or a signed and dated statement from the parent(s) that they were not required to file a tax return for 2023.

Check here if confirmation of nonfiling is provided.

Check here if signed and dated statement is provided.

Student's Name \_\_\_\_\_ SSN: \_\_\_\_\_

**Instructions:** Please complete all the fields below. If any field is left blank, we will consider the form incomplete. We will **NOT** assume 0.

STUDENT (Yearly Amount)	2023 Additional Financial Information	PARENT(S) (Yearly Amount)
	Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3: line 3 + IRS Form 1040: line 29	
	Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	

	Child support received for all children for the last completed calendar year. For example, if the student is completing the FAFSA in October 2025, they will report child support received for the 2024 calendar year. If the student is completing the FAFSA in January 2026, they will be reporting child support received for 2025. Don't include foster care or adoption fees.	
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STUDENT (Yearly Amount)	2023 Untaxed Income	PARENT(S) (Yearly Amount)
	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1-total of lines 16 + 20.	
	Tax exempt interest income from IRS Form 1040-line 2a.	
	Untaxed portions of IRA distributions from IRS Form 1040- (line 4a minus 4b) Exclude rollovers. If negative, enter a zero here.	
	Untaxed portions of pensions from IRS Form 1040- (line 5a minus 5b) Exclude rollovers. If negative, enter a zero here.	
	Foreign earned income exclusion from IRS Form 1040 Schedule 1: line 8d	

Student's Name \_\_\_\_\_

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

**F. Certification and Signature**

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Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:

You must complete the FA-DDX that transfers IRS federal tax information or submit a copy of your 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return. Must include W-2(s), and applicable schedules when you file your IRS income tax return for verification to be considered complete.

Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A 2023 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; or
- A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent must sign and date.

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

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date