

C. Student's Income Information to Be Verified: Only check ONE BOX that applies.

1. **TAX RETURN FILERS—Important Note:** The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student and spouse filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

Instructions: Complete this section if the student and spouse filed or will file a 2024 IRS income tax return(s). As part of Federal student aid eligibility, students, and spouses (as appropriate), 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 student and spouse filed separate 2024 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 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2024 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.**

Check the box that applies:

I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2024 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. Your school will use the IRS information that was transferred in the verification process.

Check here if an IRS tax return transcript or a signed tax return is attached to this worksheet.

2. **TAX RETURN NONFILERS**—Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2024 income tax return with the IRS.

Check the box that applies:

My spouse and I were not employed and had no income earned from work in 2024.

My spouse and/or I were employed in 2024 and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2024 IRS W-2 forms issued to you and your spouse. 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 your name and ID number at the top.]

Employer's Name	Annual Amount Earned in 2024?	IRS W-2 or an Equivalent document provided?
ABC's Auto Body Shop (example)	\$4,500.00 (example)	Yes (example)

Dependents Students Only: Only check ONE BOX that applies.

D. Parent's Income Information to be verified, note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. **TAX RETURN FILERS—Important Note:** The instructions below apply to each parent (or stepparent, if applicable) included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.
2. **Instructions:** Complete this section if the parents filed or will file a 2024 IRS income tax return(s). 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 2024 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 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.
3. If 2024 income tax return information for the parents was not transferred via the FA-DDX and considered verified, the parents should provide the institution with a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.**

Check the box that applies:

- The student's parent has USED the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2024 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student's school will USE the IRS information transferred into the student's FAFSA to complete the verification process.
- Check here if an IRS tax return transcript(s) or signed tax return(s) is attached to this worksheet.

4. **TAX RETURN NONFILERS—** Complete this section if the student's parent(s) will not file and is not REQUIRED to file a 2024 income tax return with the IRS.

Check the box that applies:

- The parent(s) was not employed and had no income earned from work in 2024.
- The parent(s) was employed in 2024 and has listed below the names of all the parent's employers, the amount earned from each employer in 2024, and whether an IRS W-2 form is attached. Attach copies of all 2024 IRS W-2 forms issued to the parent(s) by employer(s). List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

Employer's Name	2024 Amount Earned	IRS W-2 Attached?
SUZY'S AUTO BODY SHOP (example)	\$2,000.00 (example)	Yes (example)

G. Untaxed Income and Benefits

Provide the requested amounts for items listed (from FAFSA) below. **Do not leave any space blank** (if the items do not apply enter zero). Amounts reported should be for the 2024 calendar year.

Student Information	Item	Parent Information (If Dependent)
\$	Child Support RECEIVED for any of your children. Do not include foster care or adoption payments. If yes, provide a printed confirmation/proof of the amount received for 2024.	\$
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to amounts reported on the w-2 forms in Boxes 12a through 12d, codes, D, E, F, G, H, and S.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$
\$	Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Other UNtaxed income not reported such as workers' compensation, disability, etc. (Do not include untaxed social security or SSI payments) Include UNtaxed portion of health savings accounts from IRS 1040.	\$
\$	Money received or paid on your behalf (Example: Bills) not reported elsewhere on this form.	\$

G. Certification and Signatures

Each person signing this worksheet certifies that all the information reported on it is complete and correct. If you were REQUIRED to provide parental information, at least one of your parents MUST also sign below certifying the ACCURACY of the information provided on this form.

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

 Student's Signature (Required) Date

 Parent's Signature (Required) Date

All forms MUST be returned to Financial Aid!

A **2024 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 "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the [ID.me IRS Help Site](#).
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A copy of the signed 2024 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; **and**
- An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.

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 the institution questions the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the institution with a copy of the tax account information issued by the relevant tax authority before verification can be completed.