

2024-2025 Independent Verification Worksheet

Verification of 2022 Income Information for Student Tax Filers

A. Student Information (Please print)

Faulkner Student ID#			
Last Name	First Name	M.I.	Social Security #
Address (include apt. #)		City	State Zip Code
Date of Birth	E-mail Address		Phone Number with area code

WHAT YOU MUST DO BEFORE FINANCIAL AID CAN BE AWARDED TO YOU

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 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the student and spouse filed or will file a 2022 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 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.

If 2022 income tax information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a **2022 IRS tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

A **2022 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.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay as you go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
- 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 with 10 business days from the IRS’s receipt of the paper request form.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2022 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022, must provide:

- A signed statement listing the sources of any 2022 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2022; and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2022.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 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 **2022 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 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

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 Tax Return Database View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax and applicable schedules the individuals filed with the IRS; **and**
- 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 is 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.

B. Verification of 2022 Income Information for Student Non-tax Filers

Complete this section if the student and spouse will not file and are not required to file a 2022 income tax return with the IRS. The instructions and certifications below apply to the student and spouse, if the student is married.

Check the box that applies:

- ☐ The student and spouse were not employed and had no income earned from work in 2022.
- ☐ The student and/or spouse were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. (Provide copies of all 2022 IRS W-2 forms issued to the student and spouse by their employees). 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	IRS W-2 or an Equivalent Document provided Yes or No	Annual Amount Earned In 2022
	Total Amount of Income Earned From Work	\$

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount from each source.

- ___ Check here if non-filing statement is signed and dated.
- ___ Check here if non-filing statement will be provided later.

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C. Family Size

Family Size – Includes the following:

- ❖ **The student. (That's you)**
- ❖ **The student's spouse**, if applicable.
- ❖ **The student's dependent children if the following are true:**
 - They live with the student (or live apart because of college enrollment);
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.
- ❖ **Other people if the following are true:**
 - They live with the student;
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Relationship	Full Name	Age		
Your Name				
Spouse				
Dependent				
Dependent				
Other (Specify)				

D. Certification and Signature

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, sent to prison, or both.

Student Signature (Required)**Date**

Spouse's Signature (Optional)**Date**

Return by mail, email or fax to:

**Faulkner University
Financial Aid Office
5345 Atlanta Hwy
Montgomery, AL 36109**

QUESTIONS:

PHONE: (334) 386-7195

FAX: (334) 386-7201

E-MAIL - Faid@faulkner.edu

12/08/22