

Student Name _____

Student ID _____

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for a review process called verification. The law states that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

Household Members and College Information

- Include the student, the student’s spouse (if married), all children that will receive more than half their support from the student or spouse from July 1, 2023 through June 30, 2024 (even if a child does not live with the student), other people if they now live with the student and the student or spouse provides more than half of the other person’s support through June 30, 2024.
- Include the college name for any listed household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024.

Full Name	Age	Relationship to Student	2023-2024 College Name
		<i>Self</i>	<i>Rock Valley College</i>

If more space is needed, attach a separate page with your name and Student ID at the top.

Student Income and Tax Information – Answer each question as it applies to you:

- 1) Did you work in 2021? Answer yes, even if you were paid in cash. YES NO
- 2) Did you file, or were you required to file a 2021 Federal Tax Return? YES NO

Spouse Income and Tax Information – Answer each question as it applies to your spouse:

- 1) Did your spouse work in 2021? Answer yes, even if they were paid in cash. YES NO or N/A
- 2) Did your spouse file, or were they required to file a 2021 Federal Tax Return? YES NO or N/A

All Non-Tax Filers who earned wages in 2021 must complete the section below and provide copies of all 2021 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.

ONLY COMPLETE THE EMPLOYMENT SECTION BELOW IF YOU DID NOT FILE TAXES IN 2021

Employee’s Name <i>(Example: John A. Student)</i>	Employer’s Name <i>(Example: ABC’s Auto Body Shop)</i>	Amount Earned in 2021 <i>(Example: \$4523.75)</i>

All students and spouses must provide 2021 Tax Return Transcripts, or use the Data Retrieval Tool on the FAFSA. A 2021 Statement of Non-Filing from the IRS dated on or after October 1, 2022 is required if the student and/or spouse did not file and were not required to file a tax return.

CERTIFICATION AND SIGNATURE

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student’s Signature (required) _____

Date _____

You should make a copy of this worksheet for your records. Please see reverse side for important tax information.

How to use the IRS Data Retrieval Tool

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA.

- Go to fafsa.ed.gov and Log in using your FSA ID
- Select the “Continue” or “Make a Correction” button
- Select the "Financial Information" tab from the top of the page
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool and If eligible, click "Link to IRS"
- Review the information displayed and select the “Transfer My Information into the FAFSA” option
- Proceed to the Sign and Submit page

Instructions for the parent to request their IRS information:

- Go to "Parent Financial Information" page
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool and if eligible, select which parent is providing information on the FAFSA
- Enter the FSA ID for the parent providing the information
- Click "Link to IRS"
- Review the information displayed and select the “Transfer My Information into the FAFSA” option
- Proceed to the Sign and Submit page

Verification of 2021 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- A copy of 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 2021;
- 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 2021;
- 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, 2022;
- A copy of IRS Form W-2 for each source of employment income received for tax year 2021;
- 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 2021.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2021 must provide:

- A **2021 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 2021 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was 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 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 a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.