



## Section C – Student and Spouse (if married) Income Information

Please check the appropriate box for you and your spouse (if married) (**only check one box per column**). Please refer to the instructions for more detailed information on options.

### Student

#### 2019 Tax Filers

### Spouse

I already completed the **FAFSA IRS Data Retrieval (DRT)** process.

I have attached my 2019 IRS Tax Return Transcript **or SIGNED** copy of 2019 Federal Tax Return **including Schedules 1, 2, and 3 if applicable**.

I filed a **2019 amended return (1040X)**, have an extension, filed a foreign tax return, or cannot obtain a tax transcript due to IRS identity theft. I have provided the necessary documentation per the instructions.

#### 2019 Non Tax Filers

I did earn income from work in 2019. I did not and was not required to file a 2019 Federal Income Tax Return per the IRS. **You must list all income sources/amounts below and attach all 2019 W-2 and 1099 Mics. forms. You/spouse (if applicable) must also submit an IRS Verification of Non-filing letter.**

Individual's Name	Name of Employer	Income in 2019

I did earn income from work in 2019 but do not have any W-2s or 1099 Misc. form(s) (Ex. babysitting job, lawn job). I certify that I am not considered self-employed and I did not and was not required to file a tax return.

**You/spouse (if applicable) must also submit an IRS Verification of Non-filing letter.**

Individual's Name	Name of Employer/Job Performed	Income in 2019

I did not earn any income from work in 2019. **You/spouse (if applicable) must also submit an IRS Verification of Non-filing letter.**

To obtain an **IRS Verification of Non-filing letter**, you will need to complete [IRS form 4506-T](#) (be sure to mark box 7 for Verification of Non-filing and enter appropriate ending year which would be 12/31/2019 for 2019). Make sure to read all instructions on the form and to mail to the appropriate IRS Team. **Do not return the 4506-T form to the Financial Aid Office. \*\*Exceptions to non-filing letter, please refer to verification worksheet instructions.**

Be sure to list student ID# and name on all non-filing letters and IRS tax return transcripts.

## Section D – Student and Spouse (if married) Signatures

By signing this worksheet, I/we certify the information reported is correct to the best of our knowledge. If the Department of Financial Aid, Student Employment and Military Benefits notices a discrepancy, I/we understand corrections to the FAFSA will be submitted directly to the U.S. Department of Education. Additionally, I/we understand that any such corrections may also warrant an adjustment to any financial aid that has already been offered for the 2021-22 academic year.

Student Signature

Date

Spouse Signature (Optional)

Date

**NOTE: Signatures cannot be typed or stamped. Must be signature.**

## Verification of Non-Filing Status

Individuals who did not file a federal tax return are still required to obtain verification of non-filing letter from the IRS. **However**, if an individual is unable to obtain a verification of non-filing letter from the IRS, they can provide a **signed statement** certifying that:

- They attempted to obtain a verification of non-filing letter from the IRS, but were unsuccessful; **and**
- They have not and are not required to file an income tax return for 2019.

If a non-filer had earnings from work, W-2s from each source of income must be provided.

**Please use either the non-filing statement with earnings from work (below) or the non-filing statement with no earnings from work (next page). Only one statement should be completed.**

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### 2021-22 Non-Filing Statement With Earnings from Work

Student Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

I \_\_\_\_\_ certify that I attempted to obtain a verification of non-filing letter  
**(Non-Filer's Printed Name)**

from the IRS by the following means (please mark appropriate box):

I attempted to obtain a verification of non-filing letter from the IRS by submitting IRS form 4506-T to the IRS. I waited at least 10 days and have not received a response back.

Other (please explain your attempt to obtain the non-filing letter):

\_\_\_\_\_  
\_\_\_\_\_

In addition, I certify that I did not file and was not required to file a 2019 federal income tax return. Listed below is information about the income I earned in 2019, along with **attached copies of 2019 W-2s from each source of employment income**:

Individual's Name	Name of Employer	Income Earned in 2019

Non-Filer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Verification of Non-Filing Status

Individuals who did not file a federal tax return are still required to obtain verification of non-filing letter from the IRS. **However**, if an individual is unable to obtain a verification of non-filing letter from the IRS, they can provide a **signed statement** certifying that:

- They attempted to obtain a verification of non-filing letter from the IRS, but were unsuccessful; **and**
- They have not and are not required to file an income tax return for 2019.

If a non-filer had earnings from work, W-2s from each source of income must be provided.

**Please use either the non-filing statement with earnings from work (previous page) or the non-filing statement with no earnings from work (below). Only one statement should be completed.**

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### 2021-22 Non-Filing Statement With No Earnings from Work

Student Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

I \_\_\_\_\_ certify that I attempted to obtain a verification of non-filing letter  
**(Non-Filer's Printed Name)**

from the IRS by the following means (please mark appropriate box):

I attempted to obtain a verification of non-filing letter from the IRS by submitting IRS form 4506-T to the IRS. I waited at least 10 days and have not received a response back.

Other (please explain your attempt to obtain the non-filing letter):

\_\_\_\_\_  
\_\_\_\_\_

In addition, I certify that I did not file and was not required to file a 2019 federal income tax return. I was not employed in 2019. I did not earn any income in 2019 and have no W-2s to provide.



Non-Filer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## 2021-22 Independent Verification Worksheet Instructions

1. You must complete the attached Independent Verification Worksheet
2. **Additional Guidance for Section C**  
Provide 2019 Tax Information for yourself and spouse (if married) using one of the following methods below, unless not required to file per the IRS regulations (check appropriate box on Verification Worksheet).

- ❖ **IRS Data Retrieval Tool (DRT) for Free Application for Federal Student Aid (FAFSA)**  
Certain exclusions apply and if you are unable to use DRT please use another method below.

**\*\*The data that is transferred from the IRS will not be viewable due to enhanced security of sensitive information. Once the data is transferred, "Transferred from the IRS" will be in place of any other information.\*\* Do not correct transferred information. You will receive a letter in the mail letting you know that DRT has retrieved your tax information.**

1. Log onto [www.fafsa.gov](http://www.fafsa.gov)
2. Select "Make FAFSA Correction"
3. Select Financial Information Tab
4. Answer the questions accordingly
5. If the  Icon does not appear, **you will need to obtain 2019 tax information using one of the additional methods below instead.**
6. If the  Icon appears, select "Link to IRS" button
7. Select proceed to IRS site and Press "OK"
8. Enter the address, city, state, and zip code exactly as reported on your tax form
9. Then check "Transfer My Tax Information into the FAFSA"
10. Click "Transfer Now" button
11. Proceed to the end of FAFSA application then submit
12. Make sure the confirmation page appears after clicking the submit button

- ❖ **Contact IRS to Request 2019 IRS Tax Return Transcript using one of the following:**

- Online: at <http://www.irs.gov/Individuals/Get-Transcript>
  - Select "Get Transcript by Mail" or "Get Transcript Online" Please note, some individuals may not be able to obtain online.
  - Enter appropriate information
  - Select "**Return Transcript**" for "**2019**" tax year
  - Please be aware that it will take between 5 to 10 days for the IRS to mail
- By Phone: Call 800-908-9946
- By Mail: Complete and submit form 4506-T or 4506T-EZ to the IRS

**Be sure to list student name and ID # on all transcripts as the IRS does not print identifying information on the transcript.**

- ❖ Submit a **SIGNED** copy of **2019 Federal Tax Return including Schedules 1, 2, and 3 if applicable.**

### IRS Verification of Non-filing letter (Exceptions)

If you are unable to obtain a non-filing letter due to not having a Social Security Number, Individual Taxpayer Identification Number, or an Employer Identification Number you must submit the following:

A signed and dated statement (**by spouse, if married**), certifying that the individual(s) does not have a Social Security Number, an Individual Taxpayer Identification Number, or an Employer Identification Number. The statement must list the sources and amounts of earnings, other income and resources that supported the individual(s) for the 2019 tax year. Also, provide a 2019 W-2 for each source of employment income, if applicable.

# Unusual Tax Filing Situations

## **For Individuals Granted a Filing Extension by the IRS for 2019**

Typically the IRS allows for a six month extension of time to file your return (**October 15, 2020**). Once this date is past, we would require you to submit copies of your IRS tax transcript or utilize the IRS DRT process. Some exceptions may apply to this.

An individual who is required to file a 2019 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- **A copy of the IRS's approval of an extension beyond the automatic six-month (October 15, 2020) extension** if the individual requested an additional extension of the filing time for the tax year 2019;
- **IRS Verification of Non-filing Letter** (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2020, obtained by completing [IRS form 4506-T](#) ;
- **A copy of IRS Form W-2** for each source of employment income received for the 2019 tax year; **and**
- **A signed and dated statement (by student and spouse, if married)** certifying the estimated amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the 2019 tax year. For the AGI this would be the amount on line 8b on the IRS Form 1040. For taxes paid, this would be the amount on line 14 minus line 2 on Schedule 2 on IRS Form 1040.

*Example: For the 2019 tax year, I (insert name) and my spouse (if married, insert name) have been granted an extension from the IRS. Listed below are the best estimates at this time for the following:*

<i>Student income from work:</i>	<i>Estimated Adjusted Gross Income:</i>
<i>Spouse income from work:</i>	<i>Estimated U.S. Income Taxes Paid:</i>

## **For Individuals Who Filed an Amended 2019 IRS Income Tax Return**

If an individual filed an amended IRS Federal Income Tax Return for tax year 2019, provide both items:

- **2019 IRS Tax Return Transcript or Original (not amended) 2019 SIGNED Federal Tax Return including Schedules 1, 2, and 3 if applicable.**
- **A signed copy of the 2019 IRS Form 1040X and any applicable amended schedules,** "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

## **For Individuals Who Were Victims of IRS Identity Theft**

If an individual was a victim of IRS Identity Theft, provide both items:

- A copy of the **Tax Return Database View** (TRDBV) transcript for 2019
  - Note: A victim of IRS identify theft must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the required tax filer's 2019 IRS income tax return information (TRDBV).
- A **signed and dated statement (by student and spouse, if married)** indicating the individual(s) was a victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft.

*Example: I, (insert your name), was a victim of IRS tax-related identity theft and the IRS has been made aware of this tax-related identity theft.*

## **For Individuals Who Filed Non-IRS Income Tax Returns for 2019**

If an individual filed or will file a 2019 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country (in which a tax transcript is provided free of charge), please provide a signed copy of that 2019 income tax return. You also need to convert amounts to U.S. Currency and detail the equivalent line of the following information:

*Student income from work:*

*Spouse (if married) income from work:*

*Adjusted Gross Income:*

*Income Taxes Paid:*

If you have any questions, please go to <https://go.oncehub.com/uwmfinaid> to make an appointment to speak with a member of our Advising Staff.