

C. Income and Financial Information to Be Verified

For the **2019 Tax year**, check one row that best describes the tax or earnings status for each applicable person:

	Student	Spouse	Parent 1	Parent 2
FILED A FEDERAL TAX RETURN FOR 2019				
EARNED INCOME IN 2019, BUT DID NOT FILE TAXES				
DID NOT EARN INCOME IN 2019, AND DID NOT FILE TAXES				

- Each person who filed a 2019 tax return must attach an **IRS Tax Return Transcript** or their manually signed & dated **Tax Return form 1040, including Schedules 1, 2, and 3** (if filed).
- Each person who did not file a 2019 tax return, but did earn income from work, must attach an **IRS Wage and Income Transcript** or all **W-2 statements** received from employers.
- In addition, each person who did not file a 2019 tax return, except for the Dependent student, must attach an **IRS Verification of Non-Filing letter**, or the **KCTCS Certification of Non-Filing form**, if unable to obtain the IRS letter.

D. Certification and Signatures

Each person signing this worksheet certifies that all information reported on it is complete and correct. If student is dependent, at least one parent must sign.

Your financial aid cannot be processed until the financial aid office receives the required Verification documents. Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668), and submit corrections if necessary.

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

Date

Parent's Signature (Dependent Students Only)

Date

2021-2022 INSTRUCTIONS FOR VERIFYING TAX INFORMATION

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web. If you have not already used the tool, go to www.fafsa.gov, log in and select "[Make FAFSA Corrections](#)." In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2019 IRS income tax information into your FAFSA. You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the DRT.

If you are unable or choose not to use the IRS DRT, you **must** obtain an IRS tax return transcript or a signed and dated copy of 2019 Federal 1040, along with Schedules 1-3 if filed with the return.

To request an IRS tax return transcript, go to <https://www.irs.gov/individuals/get-transcript>. On the **Welcome to Get Transcript** page, select "Get a Tax Transcript by Mail" or "Get Transcript Online." Make sure you request the "**IRS Tax Return Transcript**" and **NOT** the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the 2019 tax return and the address on file with the IRS (the address used when your 2019 IRS tax return was filed). Provide the transcript to the financial aid office along with your Verification Worksheet.

Special Situations:

Amended Returns - If you filed an amended tax return, you must submit an IRS Tax Return Transcript **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return," along with your completed Verification Worksheet.

Victims of IRS Identity Theft - A 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 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.

Non-IRS Income Tax Returns - An individual who filed or will file a 2019 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a transcript that was obtained at no cost from the relevant taxing authority that includes all of the tax filer's income and tax information required to be verified for the 2019 tax year **OR** a signed copy of the 2019 income tax return along with the Verification Worksheet.

Filing Extensions – An individual who has been granted a filing extension by the IRS must provide a copy of IRS 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for the 2019 tax year, a copy of the IRS's approval of an extension, **AND** a copy of the W-2 for each source of employment income received for the 2019 tax year 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 the 2019 tax year.