

## CONFIRMING 2022 INCOME FOR INCOME TAX FILERS

When the FAFSA processor selects a student's FAFSA for verification, the college is obligated to check certain information about the household and family income before finalizing the student's financial aid. See options 1, 2, and 3 below for acceptable methods of verifying income for tax filers. See Option 4 for documentation required when an amended tax return is filed.

### OPTION 1 – FUTURE Act Direct Data Exchange (FA-DDX)

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 prompted to manually enter tax information, please see option 2 or 3 below.

**W-2s are required for each option below.**

### OPTION 2 – OBTAIN A TAX RETURN TRANSCRIPT FROM THE IRS

To obtain an IRS tax return transcript, go to IRS.gov and click on the "Get Your Tax Record" link or call 1-800-908-9946. You can choose to "Get Transcript Online" or "Get Transcript by Mail." The first option allows you to immediately print or save a pdf version of your transcript, which you can either mail or fax to our office. Make sure to request the "IRS tax return transcript" and not the "IRS tax 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. You will need your social security number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2022 IRS tax return was filed). If parents are married but filed separate 2022 tax returns, 2022 IRS tax return transcripts must be submitted for each parent.

\*If you filed an amended tax return, also submit a signed copy of 2022 1040X.

### OPTION 3 – SIGNED TAX RETURN

Provide a signed copy of the federal tax return (1040 or 1040-SR) and all applicable schedules. If this is the selected method, please send via our secure fax line or by mail for security of data.

\*If you filed an amended tax return, also submit a signed copy of 2022 1040X.

## CONFIRMING 2022 INCOME FOR NON-FILERS

**Provide all W-2s issued by employers for wages earned in 2022.**

If W-2s are not able to be obtained by employer(s), you may request a wage and income transcript from the IRS, which is their version of your W-2. This may be requested by selecting option 8 on Form 4506-T.

**Income earned from work also includes the following:**

- Income not reported on W-2
- Household employee wages
- Tip income
- Medicaid waiver payments
- Taxable dependent care benefits from Form 2441, line 26
- Employer provided adoption benefits from Form 8839, line 29
- Wages from Form 8919, line 6
- Other earned income
- Business income/loss
- Farm income/loss

## VICTIMS OF IDENTITY THEFT

Contact the Office of Student Financial Services for instructions on providing tax data.