

## 2018-2019 Required Documents to Complete Verification

Please submit page 3 of this document along with tax information listed below

### Parents

Parent filed a 2016 Tax Return

Parents who earned income but were  
**NOT** required **BY LAW** to file a 2016 Tax Return

2016 IRS Tax Return Transcript  
**OR**  
Use of the FAFSA Data Retrieval Tool  
(See Below)

IRS Form W-2 for each source of 2016 employment income received  
**OR**  
Wage and Income Transcript obtained through the IRS  
**AND**  
IRS Verification of Non-Filing Letter dated on or after October 1<sup>st</sup>, 2017  
(See Page 2)

**Option #1. Use the FAFSA IRS Data Retrieval Tool (DRT) – preferred method:**

**Parents who file Married Filed Jointly, Single, or Head of Household can use the DRT**

**Log in at FAFSA.gov:**

1. As a returning FAFSA filer, select the "Login" button.
2. Log in using the student's FSA ID and password.
3. Click on "Make FAFSA Corrections."
4. Create a transaction "Save Key" and click "Next."

**Parent IRS DRT (if dependent):**

1. Go to the "Financial Information" tab– parent.
2. Make sure that the status of the tax return is marked as "Already Completed."
3. You will be presented with a series of questions to determine whether the parent(s) are eligible for the IRS DRT.
4. If eligible, click "Link to IRS" to be transferred to the IRS database. Enter the parent FSA ID and password.
5. Enter the address information exactly as it appears on your 1040/1040A/1040EZ. Click "Submit."
6. Review the tax information displayed, and check the "Transfer My Tax Information into the FAFSA" box.
7. Click the "Transfer Now" button. You will be redirected back to the FAFSA.

### Option #2. Requesting an IRS Tax Return Transcript

- IRS Online Tax Return Transcript Request      <https://www.irs.gov/individuals/get-transcript>
- IRS Automated Phone Transcript Service      1-800-908-9946

## Special Tax Data Considerations

Parent(s) not required to file a federal tax return provide the following for each Non-filer:

1. A copy of IRS Form W-2 for each source of 2016 employment income received (or an equivalent document such as the Wage and Income Transcript) Wage and Income Transcripts can be obtained at [www.irs.gov/individuals/gettranscript](http://www.irs.gov/individuals/gettranscript); and
2. IRS Verification of Non-filing Letter dated on or after October 1, 2017.

An IRS Verification of Non-filing Letter can be obtained online using the [IRS Get Transcript service](#). If the individual cannot obtain one online for whatever reason, it must be obtained by completing and checking box 7 on the [IRS Form 4506-T, Request for Transcript of Tax Return](#), and mailing it to the IRS. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

### Individuals Who Filed an Amended IRS Income Tax Return:

An individual who filed an amended IRS income tax return for tax year 2016 must provide:

1. A transcript obtained from the IRS that lists 2016 tax account information of the tax filer(s); and
2. A signed copy of the IRS Form 1040X that was filed with the IRS.

**Individual who is required to file a 2016 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2016:**

1. A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," the individual filed with the IRS for tax year 2016;
2. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2016; Confirmation of nonfiling from the IRS dated on or after October 1, 2017;
3. A copy of IRS Form W-2 for each source of 2016 employment income received or an equivalent document;
4. And if self-employed, a signed statement certifying the amount of AGI and U.S. income tax paid for tax year 2016.

### For an individual who was the victim of IRS tax-related identity theft:

1. A Tax Return DataBase View (TRDBV) transcript obtained from the IRS; and
2. 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 has been made aware of the tax-related identity theft.

## 2018-2019 Dependent Student Federal Verification Worksheet (Auto-Zero)

Student's ID Number: \_\_\_\_\_ Email: \_\_\_\_\_

Student's

Full Legal Name: \_\_\_\_\_ , \_\_\_\_\_  
(Please print clearly) Last First Middle

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) has been selected for federal verification. The Office of University Scholarships and Financial Aid will compare your FAFSA with the information on this form and with any other required documents. If there are differences between your FAFSA and verification documents, we will make the corrections electronically. If necessary, our office will request additional information. Please do not make any on-line corrections to your FAFSA during this process.

### PARENT(S)

Check the one that applies:

1	Parent(s) used IRS Data Retrieval Tool to Transfer parents 2016 Tax Information to Students FAFSA
2	Parent(s) has provided a signed copy of the 2016 IRS Tax Return Transcripts
3	Parent(s) earned <b>NO</b> income for 2016 and I am not required to file a Federal Tax Return (Please provide the following) 1. I have attached an IRS Verification of Non-Filing Letter dated on or after October 1 <sup>st</sup> , 2017.
4	Parent(s) earned income for 2016 but was not required to file a Federal Tax Return (Please provide the following) 1. I am providing copies of W-2's for each source of income for 2016 2. I have attached an IRS Verification of Non-Filing Letter dated on or after October 1 <sup>st</sup> , 2017. <i>*Non-Filers only complete the chart below and attach copies of ALL W2's or statements of earnings received.</i>

Name of Employer	2016 Amount Earned	W-2 Submitted

Please be sure all information is complete and include all signatures. **Electronic signatures are not acceptable.** Make sure the student last name and ID number are clearly indicated on the top of each page.

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

**Student Signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
*No Electronic Signatures*

**Parent Signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
*No Electronic Signatures*

**Please Note:** Email is not always a secure method of communication and may inadvertently expose your information if misdirected. Virginia Tech suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery.  
If you choose to submit information through email, Virginia Tech will not be responsible for any exposure of data.)