



Verification of 2021 Income Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse if the student is married. Notify the financial aid office if the student or parent filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the student **filed or will file** a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool.* In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The student has not yet used the IRS DRT in FAFSA on the Web but will use the tool to transfer 2021 IRS income tax return information into the student’s FAFSA once the 2021 IRS income tax return has been filed.
- The student is unable or chooses not to use the IRS DRT in FAFSA on the Web and instead will provide the school a 2021 IRS Tax Return Transcript(s), or a signed copy of the 2021 IRS Federal Tax Return, including IRS Schedules 1,2, and 3 sent to the IRS

2021 Non-Tax Filers

Important Note: Complete this section if the student will not file and is not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- I did not earn income from wages in 2021 and was not required to file a 2021 IRS Federal Tax Return per the IRS.
- I did earn income from work in 2021, but I either; did not file and was not required to file a 2021 IRS Federal Tax Return per IRS OR I was required to file a 2021 IRS Federal Tax Return per IRS. All income sources, 2021 W-2(s), and amounts are listed below.

Employer’s Name	IRS W-2 Provided? Y/N	Annual Amount Earned in 2021
Total Amount of Income Earned from Work		



Student Name _____

ID: _____

Verification of 2021 Income Information for Parent Tax Filers

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the parents **filed or will file** a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool which is part of FAFSA on the Web.* In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The parents **have used** the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The parents have not yet used the IRS DRT in FAFSA on the Web but will use the tool to transfer 2021.
- The parents are unable or chose not to use the IRS DRT in FAFSA on the web and instead will provide the school a **2021 Tax Return Transcript(s), or a signed copy of the 2021 IRS Federal Tax Return, including IRS Schedules 1,2, and 3 sent to the IRS.**

2021 Non-Tax Filers

Important Note: Complete this section if the student’s parent(s) will not file and **is not required** to file a 2021 income tax return with the IRS. A statement of non-filing is required from each parent of the student’s household who did not file taxes and was not required to file.

Check the box that applies:

- The parent(s) did not earn income from wages in 2021 and was not required to file a 2021 IRS Federal Tax Return per the IRS.
By checking this box, I certify that I attempted to contact the IRS to receive a statement of non-filing (IRS 4506-T) for the tax year 2021.
- The parent(s) were employed in 2021 and have listed below the names of all the parent’s employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Attach copies of **ALL** 2021 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student’s name and CWID at the top.* By checking this box, I certify that I attempted to contact the IRS to receive a statement of non-filing (IRS 4506-T) for the tax year 2021.

Circle one: Dad/Stepdad / Mom / Stepmom Name of non-filing parent: _____	IRS W-2 Provided? Y/N	Annual Amount Earned in 2021
Employer’s Name:		
Total Amount of Income Earned from Work		



Verification of 2021 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

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

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for the tax year 2021, provide both of the following:

- A **2021 IRS Tax Return Transcript**; or
- Signed copy of the 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS, OR complete the IRS Data Retrieval Tool
- 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 Identity Theft

- A victim of IRS identity theft who is not able to obtain a 2021 IRS Tax Return Transcript or use the IRS DRT 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 tax filer's 2021 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual who filed or will file a 2021 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 must provide a signed copy of that 2020 income tax return(s).
- Convert amounts earned to U.S. currency, providing the equivalent to each parent's income from work, Adjusted Gross Income, and Income Taxes Paid.

Certification and Signatures

Each person signing this worksheet certifies that all reported information is complete and correct. The student and one parent must sign. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

Student's Signature

Date

Parent's Signature

Date

Please return form to:

OSUIT Financial Aid & Scholarships

1801 E. 4th St., Okmulgee, OK 74447

918.293.4684 | 918.293.4650 (fax)

OSUITFinancialAid@okstate.edu

<https://osuit.edu/financial-aid/index.php>