



# Sacred Heart UNIVERSITY

Office of Student Financial Assistance

## 24-25 Verification Worksheet V1 Directions – 2022 Income

Your application was selected by the U.S. Dept. of Education for review in a process called Verification. You must submit the last 5 pages of this verification worksheet and provide Income Verification from 2022, along with 2022 W2s (non-tax-filers only).

### IRS Income Verification:

- Tax filers directions are on pages 1 and 2.
- Special Circumstances directions are on page 3 (Examples: 2022 Active Tax Extensions, Identity Theft, and Non-IRS Income Tax Returns and IRA Rollovers and Pension Rollovers)
- Non-tax filers directions page 4 (also must submit all 2022 W2s or equivalent)

### Tax Filer Directions: Income Verification – 2022 Tax Year

IRS Income Verification for tax filers can be obtained in two different ways: **Option 1** - IRS Direct Data Exchange (FA-DDX) process through FAFSA; as part of federal student aid eligibility, students, spouses (as appropriate), and parent(s) (as appropriate) are required to consent and approve sharing and importing income tax information from the IRS to the FAFSA form or confirm non-filing status, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse (if applicable) or if the parent(s) filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. 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. (Note: If you reported any Foreign Income Exclusion on your FAFSA, and did the IRS Direct Data Exchange (FA-DDX) we will require the tax transcript and or tax return with all schedules) **Option 2** – If the 2022 income tax return information for the student (or spouse, or parent(s), if applicable) was not available or could not be used, you can then request a Tax Transcript through the IRS.

For families with special circumstances, such as filing tax extensions (Form 4868), victims of identity theft, non-IRS income tax returns, and IRS Rollovers and Pension Rollovers, please see the section on **special circumstances** on page 3.

## Option 1: IRS Direct Data Exchange (FA-DDX) process through FAFSA

The most efficient way to verify income is by using the IRS Direct Data Exchange (FA-DDX) process through FAFSA.

**Amended 2022 Tax Return Filers:** Families who have amended their federal tax return are eligible to use the IRS Direct Data Exchange (FA-DDX) process through FAFSA. If an amended tax return was filed **and** processed by the IRS before the FAFSA was filed, and if federal tax information (FTI) is successfully transferred, the FAFSA will contain the amended tax return data.

If you were unsuccessful in transferring your tax data through the IRS Direct Data Exchange (FA-DDX) through FAFSA or you amended your tax 2022 federal tax return after you submitted your FAFSA, please also submit to our office:

- **A signed copy of the 2022 IRS Form 1040X**, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, **in addition to one of the following**:
  - Updated income and tax information from the IRS Direct Data Exchange (FA-DDX) process through FAFSA with all tax information from the original tax return; **or**
  - A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **or**
  - A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

**IRA Rollovers and Pension Rollovers:** Provide the following to if you do have an Untaxed IRA and/or Pension Rollover:

- A written notice/request for correction to your FAFSA Untaxed IRA and/or Pension Rollover; **and**
- A copy of IRS Form 1099-R for all IRA or Pension distributions

## Option 2: IRS Tax Return Transcript(s) or a signed copy of the federal income tax return (and applicable schedules)– 2022 Tax Year

If the 2022 income tax return information for the student (or spouse, or parent(s), if applicable) was not available through IRS Direct Data Exchange FA-(DDX) process through FAFSA or could not be used, you can then request a Tax Transcript through the IRS.

- **Online Request**  
Go to the [IRS Website](https://www.irs.gov/individuals/get-transcript), click "Get Transcript by Online" or "Get Transcript by Mail." Be sure to request the "Return Transcript" and Tax Year "2022"- **NOT** the "Account Transcript."
- **Telephone Request**  
Call 1-800-908-9946 to request a 2022 IRS Tax Return Transcript.
- **Paper Request Form**  
IRS Form 4506T-EZ or IRS Form 4506-T from the [IRS](https://www.irs.gov/individuals/get-transcript) for Tax Year 2022
- **Signed Copy of your Federal Tax Return (and applicable schedules)**



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## Special Circumstances Directions: IRS Income Verification – 2022 Tax Year

### Tax Extension

An individual who is required to file a 2022 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022, must provide:

- A signed statement listing the sources of any 2022 income and the amount of income from each source; **and**
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022; **and**
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2022; **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 tax year 2022.

### Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript from the IRS or an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; **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.

### Amended Returns

If an amended tax return was filed **and** processed by the IRS before the FAFSA was filed, and if federal tax information (FTI) is successfully transferred, the FAFSA will contain the amended tax return data.

If you were unsuccessful in transferring your tax data through the IRS Direct Data Exchange (FA-DDX) through FAFSA or you amended your tax 2022 federal tax return after you submitted your FAFSA, please also submit to our office:

- A signed copy of the 2022 IRS Form 1040X that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
  - Updated income and tax information from the IRS Direct Data Exchange (FA-DDX) process through FAFSA with all tax information from the original tax return; **or**
  - A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **or**
  - A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

### Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.



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## IRA Rollovers and Pension Rollovers

Provide the following to if you do have an Untaxed IRA and/or Pension Rollover:

- A written notice/request for correction to your FAFSA Untaxed IRA and/or Pension Rollover; **and**
- A copy of IRS Form 1099-R for all IRA or Pension distributions

## Non-Tax Filer Directions: Income Verification – 2022 Tax Year

IRS Direct Data Exchange (FA-DDX) process through FAFSA; as part of federal student aid eligibility, students, spouses (as appropriate), and parent(s) (as appropriate) are required to consent and approve sharing and importing income tax information from the IRS to the FAFSA form or **confirm non-filing status**. Please also submit copies of your 2022 W2s if you did not and were not required to file a tax return in 2022. Please also complete steps 3 and/or 4.

**Nontax filers/Foreign or U.S. territory tax return** – the following individuals who are nontax filers must submit a verification/confirmation of non-filing status from a relevant tax authority other than the IRS, dated on or after October 1, 2023 that indicates a 2022 income tax return was not filed. (This means a nontax filer who answered “Yes” to the tax filing status FAFSA question about filing a foreign or U.S. territory tax return).

- For a dependent student, each parent who would have but did not file a tax return with a relevant tax authority other than the IRS; and
- For an independent student, the student and/or spouse who would have but did not file a tax return with a relevant tax authority other than the IRS.

Sign and submit the Verification/Confirmation of Non-filing Letter to Sacred Heart University; make sure to include the student’s name and Sacred Heart ID number on the letter. **Submit All 2022 W-2 forms or equivalent.** If you are unable to obtain the Verification/Confirmation of Non-filing Letter you may certify this on steps 3 and/or 4 that you were unable to obtain this document.



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## 24-25 Verification Worksheet V1

### Step 1: Student Information

Full Name: \_\_\_\_\_ ID Number: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Email Address: \_\_\_\_\_

Home Phone Number: \_\_\_\_\_ Alternate/Cell Phone Number: \_\_\_\_\_

### Step 2: Family Members (Complete Family Members Table on next page)

If you are a [dependent student](#):

- Include **yourself**.
- Include your **parent(s)**:
  - Even if you are not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- Include your **sibling(s)** if the following are true:
  - They live with your parents (or live apart because of college enrollment)
  - They receive more than half of their support from your parents, **and**
  - They will continue to receive more than half their support from the student's parents during the award year.
- Include **other dependents**, if the following are true:
  - They live with the your parents
  - They receive more than half of their support from the student's parents, **and**
  - They will continue to receive more than half their support from the student's parents during the award year.

If you are an [independent student](#):

- Include **yourself**.
- Include your **spouse**, if you are married.
- Include your **dependent children** if the following are **true**:
  - They live with you (or live apart because of college enrollment); **and**
  - They receive more than half of their support from you; **and**
  - They will continue to receive more than half their support from you during the award year.
- Include **other dependents** if the following are **true**:
  - They live with the you **and**
  - They receive more than half of their support from you; **and**
  - They will continue to receive more than half their support from you during the award year



### Family Members Table Instructions:

- Table 1: Family Member Verification Table*

[illegible]



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## Step 3: Student 2022 Tax Filing & Income Information

Were you required to file a 2022 Federal Income Tax Return?

☐ **Yes** and I have provided the required IRS Income Verification documentation and/or used the IRS Direct Data Exchange (FA-DDX) process through FAFSA. Continue to Step 4.

☐ **No** and I have completed the table below for all income earned from work in 2022 and provided copies of all 2022 W-2 forms (or equivalent documentation) for each employer

Are you a Non Tax filer from a Foreign or U.S. territory?

☐ **No, OR**

☐ **Yes** I am a dependent student, **OR**

☐ **Yes** I am an independent student and I have provided 2022 Verification of Non-filing Letter from a relevant tax authority other than the IRS. (See Income Verification Instructions), **OR**

☐ **Yes** I am an independent student and I was unable to obtain the Verification of Non-filing Letter from a relevant tax authority other than the IRS or other relevant tax authority. I am signing below certifying I was unable to obtain this document.

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

If you did not earn any income from work, please write "none" or "not applicable." Continue to STEP 4.

Table 2: Sources of Income in 2022 for Non-Filers

Employer (Fill out only if you did NOT file taxes)	IRS W-2 Form Provided (Yes or No)	Amount Earned in 2022
		\$
		\$
		\$
		\$
Total Income From Work		\$



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## Step 4: Spouse or Parent 2022 Tax Filing & Income Information

Were you required to file a 2022 Federal Income Tax Return?

☐ **Yes** and I have provided the required IRS Income Verification documentation and/or used the IRS Direct Data Exchange (FA-DDX) process through FAFSA. If there was a change in marital status after December 31, 2022, notify the financial aid office. Continue to Step 5.

☐ **No** and I have completed the table below for all income earned from work in 2022 and provided copies of all 2022 W-2 forms (or equivalent documentation) for each employer

Are you a Non Tax filer from a Foreign or U.S. territory?

☐ **No, OR**

☐ **Yes** and I have provided 2022 Verification of Non-filing Letter from a relevant tax authority other than the IRS. (See Income Verification Instructions), **OR**

☐ **Yes** I am an independent student and I was unable to obtain the Verification of Non-filing Letter from a relevant tax authority other than the IRS or other relevant tax authority. I am signing below certifying I was unable to obtain this document.

Signature(s): \_\_\_\_\_

Printed Name(s): \_\_\_\_\_

If you did not earn any income from work, please write "none" or "not applicable." Continue to Step 5.

*Table 3: Sources of Income in 2022 for Non-Filers*

Employer (Fill out only if you did NOT file taxes)	IRS W-2 Form Provided (Yes or No)	Amount Earned in 20212
		\$
		\$
		\$
		\$
Total Income From Work		\$





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## Step 5: Certification and Signatures

Notes: If any information on this form is left blank it will be considered zero or not applicable. Also any individuals who submit W-2s that total a gross income that equals or exceeds the IRS tax filing threshold must file an income tax return before the student is eligible to receive Title IV aid. These Individuals may have to then request a Social Security Number, an Individual Taxpayer Identification Number, or an Employer Identification Number.

**Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent/spouse must sign and date.**

**Student's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Parent's or Spouse's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**(Typed or e-signatures are not acceptable. Please print, and actually sign and date this document.)**

If there are differences between your application and the documents you've submitted, correction may be needed. We cannot process your federal aid until verification has been completed. Please provide the required documentation within 15 days of starting school or the start of your next academic year as applicable.

**This document may be submitted to the Office of Student Financial Assistance ONLY via SHUAwards (Menu > Documents & Messages > Upload it now!), secure fax, mail, or in-person as it contains personally identifiable information.**

**5151 Park Avenue, Fairfield, CT 06825 203-371-7980 (phone) 203-365-7608 (secure fax)**