

C. Verification of 2022 Income Information for Student/Spouse Tax Filers

Instructions: Complete this section if the student and/or spouse filed or will file a 2022 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at studentaid.gov.* In most cases, no further documentation is needed to verify 2022 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:

- Check and submit the 2022 IRS Tax Return Transcript or a signed copy of the 2022 income tax return.
- Check if student has used the IRS Data Retrieval Tool and the FAFSA has been updated.
- The student and/or spouse was not required to file a 2022 Federal Income Tax Return.

A **2022 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "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.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.

If the student and spouse filed separate 2022 IRS income tax returns, the IRS DRT cannot be used and the **2022 IRS Tax Return Transcript(s) must be provided for each.

Verification of 2022 Income Information for Student/Spouse Nontax Filers

The instructions and certifications below apply to the student/spouse. Complete this section if the student/spouse will not file and is not required to file a 2022 income tax return with the IRS.

Check the box that applies:

- The student and/or spouse was not employed and had no income earned from work in 2022.
- The student and/or spouse was employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the student/spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

Employer’s Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2022
<i>(Example) ABC’s Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

The student and or their spouse may have to provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2023 that indicates a 2022 IRS income tax return was not filed with the IRS or other relevant tax authority or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

Individuals Granted a Filing Extension by the IRS

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;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- 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.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2022 must provide 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 on an ISIR record with all tax information from the original tax return;
- 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.

Individuals Who Filed 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.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

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

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, 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

D. In addition to completing the information requested on this verification worksheet, you are also required to submit the following:

1. Completed Identity and Statement of Educational Purpose form (*Enclosed*)

a. You must appear in person at the Luzerne County Community College Financial Aid Office located at 521 Trailblazer Dr. Nanticoke, PA 18634, to verify your identity and sign the enclosed Statement of Educational Purpose (Signed at Institution). You must bring an unexpired, valid government-issued photo identification (ID), such as a driver’s license, other state-issued ID, or passport. Office hours are Monday through Friday 8:00am to 5:00pm. Our phone number is (800) 377-5222 ext. 7389.

OR

b. If you are unable to appear in person at the Financial Aid Office, you are required to complete the enclosed Identity and Statement of Educational Purpose (Signed with Notary) and mail it along with a copy of an unexpired, valid government-issued photo ID to the Luzerne County Community College Financial Aid Office located at 521 Trailblazer Dr. Nanticoke, PA 18634. The Notary’s Certificate of Acknowledgement section of this form must be completed by a licensed Notary to be accepted.

E. Certifications and Signatures

Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

_____	_____
Print Student’s Name	Student’s ID Number
_____	_____
Student’s Signature (Required)	Date
_____	_____
Spouse’s Signature (Optional)	Date

Return this form and requested documents to:

**Luzerne County Community College
Office of Financial Aid
521 Trailblazer Dr.
Nanticoke, PA 18634
Phone: 570-740-0389**

**Upload documents to the Self-Service section of
your student portal
Email: fao@luzerne.edu**

