

C. Dependent Student's Income Information to Be Verified

1. **TAX RETURN FILERS** — **Important Note:** If the student filed, or will file, an amended 2021 IRS tax return, the student must contact the EMU financial assistance office before completing this section.

Check the box that applies:

- The student has used the IRS Data Retrieval Tool as part of FAFSA to retrieve and transfer 2021 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred in the verification process.*
- The student has not yet used the IRS Data Retrieval Tool as part of FAFSA, but will attempt to use the tool to retrieve and transfer 2021 IRS income information into the student's FAFSA. *See instructions on the last page for information on how to use the IRS Data Retrieval Tool.*
- The student is unable or chooses not to use the IRS Data Retrieval Tool as part of FAFSA, and the student will submit to the school a **signed copy of their 2021 U.S. Individual Income Tax Return and applicable schedules.**

2. **TAX RETURN NONFILERS** — 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:

- The student was not employed and had no income earned from work in 2021.
- The student was employed in 2021 and has listed below the names of all the student'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 student by employers.**

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 ID number at the top.

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
<i>Ben's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

D. Parent's Income Information to Be Verified- NOTE: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—Important Note: If the student's parent(s) filed or will file an amended 2021 IRS tax return, the student's financial aid administrator must be contacted before completing this section.

Check the box that applies:

- The student's parent has used the IRS Data Retrieval Tool as part of FAFSA to transfer 2021 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2021 IRS income information into the student's FAFSA. *See instructions on the last page for information on how to use the IRS Data Retrieval Tool.*
- The parent is unable or chooses not to use the IRS Data Retrieval Tool as part of FAFSA, and will submit to the school a **signed copy of their 2021 U.S. Individual Income Tax Return and applicable schedules.**

2. TAX RETURN NONFILERS—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.

Check the box that applies:

- The parent(s) was not employed and had no income earned from work in 2021. **You must obtain proof of non-filing from the IRS. Follow the instruction on the last page to obtain a letter of non-filing for 2021 from the IRS.**
- The parent(s) was employed in 2021 and has 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 ID number at the top. You must obtain proof of non-filing from the IRS. Follow the instruction on the last page to obtain a letter of non-filing for 2021 from the IRS.*

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
<i>Abby's Diner (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>

E. Certification and Signatures

Each person signing this worksheet certifies that all information reported is complete and correct. The student and one parent must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature

Date

Return to: EMU Financial Assistance Office
1200 Park Road
Harrisonburg VA 22802

Questions: Call 540.432.4137
Fax Number: 540.432.4081
e-mail: finaid@emu.edu

Instructions for IRS Data Retrieval, IRS Tax Transcript, IRS Non-Filing Letter

IRS Data Retrieval (through FAFSA)

1. Go to FAFSA.gov, log in to the student's 2023-24 FAFSA record.
2. Select "Make FAFSA Corrections."
3. Navigate to the Financial Information section of the form.
4. Follow the instructions to determine if the student and/or parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax return information into the student's FAFSA record.
5. Scroll through the remainder of the record to the end of the application, sign and submit.

Ordering IRS Non-Filing Letter

Parent(s) who did not file a 2021 income tax return are required to obtain a letter from the IRS to verify a federal income tax return was not filed.

1. Complete the enclosed 4506-T form
2. Provide information for items 1-4
3. Sign and date; be sure to include the telephone number of the non-filer
4. Mail the completed 4506-T to EMU financial assistance office.
5. The financial assistance office will forward the request form to the IRS.

The IRS will mail the non-filing letter to the address provided on the form. Forward the IRS non-filing letter to EMU financial assistance office.

NOTE: If the parent(s) have filed federal income tax returns in the past but not for 2021, a Non-Filing letter can also be obtained by calling the IRS at 1.800.908.9946