



**C. PARENT TAX INFORMATION** – Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents. 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.

Did you, the parent(s), file taxes for 2021?  Yes (Complete section 1, and skip section 2 of this page.)

No (Complete section 2, and skip section 1 of this page.)

**1. TAX RETURN FILERS – Important Note:** If the parent(s) filed, or will file, an amended 2021 IRS Tax return, the parent(s) must submit the 2021 IRS Tax Return transcript and the signed 1040X which includes the reason for the amendment.

**Check the box that applies:**

- The parent(s) has used the IRS Data Retrieval Tool in the FAFSA to transfer 2021 IRS income tax return information into the student's FAFSA.
- The parent(s) has not yet used the IRS Data Retrieval Tool in the FAFSA, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- The parent(s) is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the institution with a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.**

A **2021 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to [www.irs.gov](http://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](http://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 parent(s) filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** must be provided for each.

- Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.
- Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

**2. Tax Return Nonfilers** – complete this section if the parent(s) will not file and is not required to file a 2021 income tax return with the IRS. Parent must submit a 2021 Verification of Non-filing letter from the IRS dated on or after October 1, 2022. To obtain a letter of non-filing, go to [www.irs.gov](http://www.irs.gov) and click on the "Get a Transcript" link, or call 1-800-908-9946, or for new users, you may need to request copy via the "Get Transcript by Mail" link provided.

**Check the box that applies:**

- The parent(s) was not employed and had no income earned from work in 2021. Parent must submit a letter of non-filing from the IRS.
- The parent(s) was employed in 2021. Provide the source(s) and the amount(s) earned in 2021 in the table below. Parent must submit a letter of non-filing from the IRS dated on or after October 1, 2022.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021

**D. STUDENT/SPOUSE'S TAX INFORMATION** – Note: If the student is married, the questions below apply to both the student and spouse. Notify the Financial Aid office if the student and spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

- Did you, the student, file taxes for 2021?  Yes (Complete section 1, and skip section 2 of this page.)  
 No (Complete section 2, and skip section 1 of this page.)

**1. TAX RETURN FILERS** – Important Note: If the student filed, or will file, an amended 2021 IRS Tax return, the student must submit the 2021 IRS Tax Return transcript and the signed 1040X which includes the reason for the amendment.

**Check the box that applies:**

- The student has used the IRS Data Retrieval Tool in the FAFSA to transfer 2021 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS Data Retrieval Tool in the FAFSA, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- The student (and/or the student's spouse, if married) is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.**

A **2021 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to [www.irs.gov](http://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](http://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 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules must be provided for each.

\_\_\_ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.

\_\_\_ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

**2. Tax Return Nonfilers** – complete this section if the student and spouse, if married, will not file and are not required to file a 2021 income tax return with the IRS.

**Check the box that applies:**

- The student (and/or the student's spouse, if married) was not employed and had no income earned from work in 2021.
- The student (and/or the student's spouse, if married) was employed in 2021. Provide the source(s) and the amount(s) earned in 2021 in the table below.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021

If the student is independent, student and spouse (if married) must submit a 2021 Verification of Non-filing letter from the IRS dated on or after October 1, 2022. To obtain a letter of non-filing, go to [www.irs.gov](http://www.irs.gov) and click on the "Get a Transcript" link, or call 1-800-908-9946, or for new users, you may need to request copy via the "Get Transcript by Mail" link provided.

Student Name \_\_\_\_\_

Student ID Number \_\_\_\_\_

**E. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE**

The student must sign the following:

I, \_\_\_\_\_, certify that I am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Delta State University for 2023-2024.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's ID Number

**If Signed at the Institution:**

The student must appear in person at Delta State University to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.

**If NOT Signed at the Institution:**

If the student is unable to appear in person at Delta State University to verify his or her identity, the student must provide:

- A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and the original notarized Statement of Educational Purpose provided below (**the original document(s) must be mailed or hand-delivered to the office**).

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_ City/County of \_\_\_\_\_ on \_\_\_\_\_, before me,

\_\_\_\_\_, personally appeared, \_\_\_\_\_, and provided to me on basis of satisfactory evidence of  
(notary's name) (student's name)

identification \_\_\_\_\_ to be above-named person who signed the foregoing instrument.  
(Type of government-issued photo ID provided)

**WITNESS my hand and official seal**

\_\_\_\_\_  
Notary Signature

My commission expires on \_\_\_\_\_ (Date)

**For Financial Aid Office Use Only**

I have reviewed the front and back copy of the unexpired valid government-issued photo identification (ID) that was presented with this form.

\_\_\_\_\_  
FA Staff Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
FA Staff Signature

**F. CERTIFICATION AND SIGNATURE REQUIRED**

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. I understand that if I purposely give false or misleading information on this worksheet I may be fined, sent to prison, or both.

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's ID Number

\_\_\_\_\_  
Student's Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature – Dependent Students (Required)

\_\_\_\_\_  
Date

*In accordance with Title IX, Delta State University is committed to maintaining a learning and working environment free from sexual and gender-based discrimination, harassment, sexual assault, sexual exploitation, sexual intimidation, stalking, dating violence, domestic violence, or any other behavior that is non-consensual or has the purpose or effect of coercing a person or persons. For questions or concerns about Title IX, please visit <http://www.deltastate.edu/policies/policy/university-policies/employment/employee-responsibilities-and-standards/sexual-harassment/> or contact Deidra Byas, Title IX Coordinator at (662)846-4690 or email [titleix@deltastate.edu](mailto:titleix@deltastate.edu).*