

- C. **PARENT TAX INFORMATION (FOR DEPENDENT STUDENTS ONLY)** – 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 2022 or had a change in marital status after December 31, 2022.

Did you, the parent(s), file taxes for 2022? 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

Check the box that applies:

- I/We consented to transfer the 2022 IRS income tax information and it was successfully transferred in the FAFSA.
- 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.
- I/We consented to transfer the 2022 IRS income tax information and it was not transferred into the FAFSA.
- If the 2022 income tax return information for the parent(s) was not available or could not be used, provide DSU Office of Financial Aid with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules. If the parents filed "married filing separately," both parents' tax return transcripts for 2022 will need to be sent.

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.

- I/We filed an amended IRS Income Tax Return for 2022.
- 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 return;
 - A 2022 IRS Tax Return Transcript (that will only include information from the original return and does not have to be signed), or any other IRS tax transcript(s) that includes all 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.

2. **Tax Return Non-filers** – 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 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 2022.
- The parent(s) was employed in 2022. Provide the source(s) and the amount(s) earned in 2022 in the table below. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes student's name and DSU ID.

Employer's Name	Name of Parent Employed	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2022
			\$
			\$
			\$
			\$

Student Name _____

Student ID Number _____

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 2022 or had a change in marital status after December 31, 2022.

- Did you, the student, file taxes for 2022? 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

Check the box that applies:

- I/We consented to transfer the 2022 IRS income tax information and it was successfully transferred into the FAFSA.
- 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.
- I/We consented to transfer the 2022 IRS income tax information and it was not transferred into the FAFSA.
- If the 2022 income tax return information for student and spouse (if applicable) was not available or could not be used, provide the DSU Office of Financial Aid with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules. If the student and spouse (if applicable) filed "married filing separately," both the student and spouse's tax return transcripts for 2022 will need to be sent to us.

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.

- I/We filed an amended IRS Income Tax Return for 2022.
- 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 return;
 - A 2022 IRS Tax Return Transcript (that will only include information from the original return and does not have to be signed), or any other IRS tax transcript(s) that includes all 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.

2. Tax Return Non-filers – complete this section if the student and spouse, if married, will not file and are not required to file a 2022 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 2022.
- The student (and/or the student's spouse, if married) was employed in 2022. Provide the source(s) and the amount(s) earned in 2022 in the table below. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes student's name and DSU ID.

Employer's Name	Name of Student and/or student's spouse, if married	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2022
			\$
			\$

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

Equal Access Statement

Delta State University is committed to maintaining a learning and working environment free from sexual and gender-based discrimination or harassment. Our goal is for all to have equal access to the many great services and opportunities we offer. For more information, or to report an incident, see <https://www.deltastate.edu/titleix/> or email titleix@deltastate.edu.