

Student's name _____

Valpo ID # _____

Student's Tax Filing Status—Tax Year 2021	
Did you file or were you required to file a 2021 U.S. Federal Income Tax Return?	
<input type="checkbox"/> Yes	<input type="checkbox"/> I have used the IRS Data Retrieval Tool to transfer my 2021 IRS income into my FAFSA and attached is a copy of my 2021 W2(s) , or if self-employed , a copy of Schedule C <input type="checkbox"/> IRS Data Retrieval Tool was NOT used <input type="checkbox"/> Attached is a signed copy of my 2021 IRS Federal Tax Return or Tax Return Transcript* along with a copy of my 2021 W2(s) . If self-employed , attached is a copy of Schedule C
<input type="checkbox"/> No	I had no earnings from work <input type="checkbox"/> I have provided/requested the Verification of Non-Filing Letter** from the IRS
<input type="checkbox"/> No	I had some earnings from work (Provide/check all that apply): <input type="checkbox"/> I have attached a copy of my 2021 W2 form(s) <input type="checkbox"/> I have attached a copy of my 2021 1099 MISC <input type="checkbox"/> I have attached all Schedules from the Federal Tax Return

Spouse's Tax Filing Status—Tax Year 2021	
Did your spouse file or were they required to file a 2021 U.S. Federal Income Tax Return?	
<input type="checkbox"/> Yes	<input type="checkbox"/> The IRS Data Retrieval Tool was used to transfer their 2021 IRS income into the FAFSA and attached is a copy of their 2021 W2(s) , or if self-employed , a copy of Schedule C <input type="checkbox"/> RS Data Retrieval Tool was NOT used <input type="checkbox"/> Attached is a signed copy of their 2021 IRS Federal Tax Return* or Tax Return Transcript along with a copy of their 2021 W2(s) . If self-employed , attached is a copy of Schedule C
<input type="checkbox"/> No	My spouse had no earnings from work <input type="checkbox"/> I have provided/requested the Verification of Non-Filing Letter** from the IRS
<input type="checkbox"/> No	My spouse had some earnings from work (Provide/check all that apply): <input type="checkbox"/> Attached is a copy of my spouse's 2021 W2 form(s) <input type="checkbox"/> Attached is a copy of my spouse's 2021 1099 MISC <input type="checkbox"/> Attached are all Schedules from my spouse's Federal Tax Return

*A guide for getting your **Tax Return Transcript** is on valpo.edu/sfs under the **FORMS** link. If student and spouse filed separately, a **Federal Tax Return or Tax Return Transcript must be provided for both the student and the spouse.**

If you or your spouse did not file taxes and were not required to file, please send in a **2021 Verification of Non-Filing Letter from IRS.gov. To receive the document you must click on "Get Your Tax Record" and then click on "Get Transcript Online".

Other Income Information - Tax Year 2021

Please report all applicable income information for the student and spouse below for the 2021 tax year.
Please indicate \$0 in any field that does not apply.

Student	Income Resources for 2021	Spouse
\$	Child support RECEIVED for all children in 2021. Do not include foster care or adoption payments.	\$
\$	Untaxed Income <ul style="list-style-type: none"> Workers compensation Disability benefits Untaxed foreign income The untaxed portions of health savings accounts (IRS Form 1040 Schedule 1 — line 13) 	\$
\$	Housing, food and other living allowance paid to you/spouse: (select all that apply): <input type="checkbox"/> Clergy <input type="checkbox"/> Military (including cash payments and cash value of benefits). Do not include value of on-base housing or basic military allowance/parsonage value.	\$
\$	Veteran's Non-Educational Benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational work-study allowances.	\$
\$	Select all that apply <input type="checkbox"/> Welfare <input type="checkbox"/> TANF <input type="checkbox"/> SNAP <input type="checkbox"/> Food Stamps	\$
\$	Taxable Income from: Federal Work Study, Co-Op Earnings, Fellowships, Combat Pay, AmeriCorps benefits, grants/scholarships over tuition, fees, books (circle those that apply.)	\$
\$	Money Received or paid on your behalf (e.g. bills) by a person not reported on this form. Do include distributions to the student from a 529 plan that is owned by someone other than you or your parents (such as grandparents, aunts, and uncles.) (You must include these distribution amounts.) Do not include Social Security benefits.	\$
<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	IRA/Pension distributions: If you have a difference between lines 4a minus 4b OR 5a minus 5b from the IRS form 1040, was this amount a rollover?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

Certification and Signatures

I certify that all the information reported on this worksheet is complete and correct. **Electronic signatures are not accepted.**

Student Signature _____

Date _____