



**SECTION 2: VERIFICATION OF 2022 INCOME INFORMATION FOR STUDENT TAX FILERS**

**Instructions:** Complete this section if the student and spouse (if married) **filed or will file** a 2022 IRS income tax return(s). Check all that apply:

- 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 MBU Financial Aid Office 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 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.
  - **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.
  - **Automated Telephone Request**
    - Call 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.
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- 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 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.

**SECTION 3: VERIFICATION OF 2022 INCOME FOR NON-TAX FILERS**

**Instructions:** Complete this section ONLY if the student and/or spouse will not, and were not required to, file a 2022 income tax return with the IRS. Follow each of the steps below.

**Step 1: Student Non-Tax Filer - check the appropriate box below:**

- Student was not employed and had no income earned from work in 2022.
- Student 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. 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 the student’s name and MBU ID.

Employer’s Name	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2022
		\$
		\$
		\$
		\$
<b>Total amount of income earned from work</b>		\$

**Step 2: Spouse Non-Tax Filer. Check the appropriate box below:**

- Spouse was not employed and had no income earned from work in 2022.
- 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. 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 the student’s name and MBU ID.

Employer’s Name	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2022
		\$
		\$
		\$
		\$
<b>Total Amount of Income Earned from Work</b>		\$

**Step 3: Non-Tax Filer Statement if income earned in 2022**

Provide a signed and dated statement certifying that the individual(s) has not filed and is not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount of income from each source.

- \_\_\_\_\_ Check here if non-filing statement is provided.
- \_\_\_\_\_ Check here if non-filing statement will be provided later.

**Step 4: Submit copies of all 2022 W-2 Forms issued to the student and spouse (if applicable) who had any income in 2022.**

Additional documentation may be requested by the financial aid office upon review of your worksheet and income information.

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

\_\_\_\_\_  
Student Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (If applicable)

\_\_\_\_\_  
Date

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

