

Student Name: _____ UID: _____ Page 2 of 2

Section D: Untaxed Distributions – IRAs, Pensions, Annuities (2022 IRS Form 1040, Lines 4a and 5a minus 4b and 5b)		
Student (If applicable)	Parent (Both parents, if taxes are filed jointly)	Parent Spouse or Partner (If taxes are filed separately)
<input type="checkbox"/> No IRA, Pension, Annuity Rollover <input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover \$ _____	<input type="checkbox"/> No IRA, Pension, Annuity Rollover <input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover \$ _____	<input type="checkbox"/> No IRA, Pension, Annuity Rollover <input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover \$ _____

Section E: Tax Filing Information for 2022	
Student must complete this section	
Student 2022 Taxes	<input type="checkbox"/> Student filed a 2022 tax return Provide one of these tax documents <ul style="list-style-type: none"> Use the Direct Data Exchange on the 2024-2025 FAFSA Send a copy of the 2022 Federal IRS Tax Return Transcript Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1, 2, & 3, if filed with the tax return
	<p>The student did not file AND <u>was not required</u> to file a 2022 income tax return with the IRS.</p> <input type="checkbox"/> Student was not employed and had no income from work in 2022. <input type="checkbox"/> Student worked in 2022 →→→→ <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small>
	<p>Add 2022 employment information below (if no tax return was filed). List every employer even if the employer did not issue an IRS W-2 form.</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p>

Parent(s) must complete this section	
Parent(s) 2022 Taxes	<input type="checkbox"/> Parent filed a 2022 tax return Provide one of these tax documents <ul style="list-style-type: none"> Use the Direct Data Exchange on the 2024-2025 FAFSA Send a copy of the 2022 Federal IRS Tax Return Transcript Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1, 2, & 3, if filed with the tax return
	<p>Parent did not file AND was not required to file a 2022 income tax return with the IRS.</p> <input type="checkbox"/> Parent 1 was not employed and had no income from work in 2022. <input type="checkbox"/> Parent 1 worked in 2022 →→→ <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small>
	<p>Add 2022 employment information below (if no tax return was filed). List every employer even if they did not issue an IRS W-2 form.</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p>
	<input type="checkbox"/> There is no other parent or stepparent in the household
	<input type="checkbox"/> Parent Spouse or Partner (Parent 2) filed a 2022 tax return Provide one of these tax documents <ul style="list-style-type: none"> Use the Direct Data Exchange on the 2024-2025 FAFSA Send a copy of the 2022 Federal IRS Tax Return Transcript Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1, 2, & 3, if filed with the tax return
	<p>Parent Spouse or Partner (Parent 2) did not file AND was not required to file a 2022 income tax return with the IRS.</p> <input type="checkbox"/> Parent 2 was not employed and had no income from work in 2022. <input type="checkbox"/> Parent 2 worked in 2022 →→→ <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small>
	<p>Add 2022 employment information below (if no tax return was filed). List every employer even if they did not issue an IRS W-2 form.</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p>

Tips for Completing the Verification Worksheet

Verification is a process required by the U.S. Department of Education to confirm that the information reported on the FAFSA is accurate. The U.S. Department of Education randomly selects students for this process. The Office of Financial Aid begins verifying FAFSA information after receiving all requested forms and documentation.

See the Verification Worksheet for the corresponding sections B, D, and E below.

Section B. Legal parent(s) for the FAFSA as defined by the U.S. Department of Education

Legal parent for the FAFSA includes biological parent(s), stepparent, and adoptive parents. For the FAFSA, grandparents, foster parents, legal guardians, legal custodians, brothers, sisters, aunts, uncles, and widowed stepparents are not legal parents unless they have legally adopted the student.

Marital Status of student's parent(s)	Information required by the U.S. Department of Education
Married	Both of your parents (includes biological, step-parent, or legal adoptive parents)
Unmarried, but biological parents live together	Both of your legal parents
Remarried (previously divorced/widowed)	Legal parent and stepparent
Divorced or Separated	Provide information about the parent who provided more financial support during the last 12 months. If both parents provided an exact equal amount of financial support or if they don't support you financially, provide information for the parent with the greater income and assets.
Widowed	Legal parent only (unless remarried)
Never married (to any person)	Provide information about the parent who provided more financial support during the last 12 months. If both parents provided an exact equal amount of financial support or if they don't support you financially, provide information for the parent with the greater income and assets.

Section B. Family Size:

- When determining if your parents provide more than half support for siblings or other persons, support includes housing, utilities, cell service, transportation, food, clothing, medical, childcare, and personal expenses.
- Do not include foster children for whom the parent(s) received a subsidy.

Section D: Untaxed Distributions from IRAs, Pensions, Annuities

Untaxed IRA Distributions = 2022 IRS Tax Form 1040 (line 4a minus line 4b)

Untaxed Pensions and Annuities = 2022 IRS Tax Form 1040 (line 5a minus line 5b)

NOTE: If the student's and/or parent's tax return(s) show a **ROLLOVER** for all or part of the untaxed amount (calculated above), check the box for IRA/Pension Rollover on the Verification Worksheet and add the rolled over amount to the worksheet.

Section E: FAFSA Requirements for the Student and/or Parent(s) Who DID FILE a 2022 Tax Return

Provide official tax information → 3 options:

- 1.) Use the Direct Data Exchange (FADDX) on the FAFSA to transfer tax information
- 2.) Obtain the *IRS Tax Return Transcript for 2022 and submit a copy to Enrollment Services
- 3.) Submit a copy of the 2022 tax return, Form 1040, that was filed with the IRS
 - ✓ Requires taxpayer signature or signature/credentials of a tax professional who prepared the return
 - ✓ Must also submit copies of Schedules 1, 2, and 3, if any of them were used for the tax return

Section E: FAFSA Requirements for the Student and/or Parent(s) Who DID NOT FILE a 2022 Tax Return

Student and/or Parent(s) who earned money from work in 2022 but did not file a tax return:

Sometimes wage earners do not earn enough to require them to file a tax return, or their income is not taxable.

For earnings from work → two steps:

- 1.) Must provide copies of all W-2s for 2022 (or the IRS Wage & Income Transcript)
- 2.) On the Verification Worksheet, list the names of all employers and amounts earned for 2022, even if the employer did not issue a W-2.

RESOURCES

*IRS Tax Transcripts Wage & Income Transcript	Order the Tax Return Transcript, Tax Account Transcript, IRS Verification of Non-Filing, and Wage and Income Transcript for W-2s https://www.irs.gov/individuals/get-transcript
Financial Aid Dashboard on Wings	Track verification status on student's Financial Aid Dashboard on WINGS. The student will be contacted if more information is needed.
Deadline and Processing Timeframes	https://www.wright.edu/enrollment-services/financial-aid/important-dates