

Tax Status and Requirements: Student/Spouse *Check all applicable boxes.*

- (1) The student and/or spouse filed a 2023 federal income tax return and provided consent on the FAFSA to transfer 2023 Federal Tax Information (FTI) through Direct Data Exchange (DDX).
- (2) The student and/or spouse filed a 2023 federal income tax return but did not, or could not, use the Direct Data Exchange to transfer 2023 income information on the FAFSA. **You must attach a signed copy of the 2023 federal tax return or the IRS Tax Return Transcript.**
- (3) The student and/or spouse worked in 2023 but did not file and were not required to file a 2023 federal tax return. **Attach copies of W-2 forms and complete the following box. Continue to complete (5).**

Employee Name	Employer	Amount Earned in 2023
		\$
		\$
		\$

- (4) The student and/or spouse had no taxable income from work and did not file and were not required to file a 2023 federal tax return. **Continue to complete (5).**
- (5) I certify that I/we did not file and were not required to file a 2023 federal income tax return and that attempts to obtain a Verification of Non-Filer Form from the IRS were unsuccessful. The non-filer is: ___ student ___ spouse ___ both.

Tax Status and Requirements: Parent (if dependent) *Check all applicable boxes.*

- (1) Parent(s) filed a 2023 federal income tax return and provided consent on the FAFSA to transfer 2023 Federal Tax Information (FTI) through Direct Data Exchange (DDX).
- (2) Parent(s) filed a 2023 federal income tax return but did not, or could not, use the Direct Data Exchange to transfer 2023 income information on the FAFSA. **You must attach a signed copy of parents' 2023 federal tax return or the IRS Tax Return Transcript.**
- (3) Parent(s) worked in 2023 but did not file and were not required to file a 2023 federal tax return. **Attach copies of W-2 forms and complete the following box. Continue to complete (5).**

Parent Employee Name	Parent Employer	Parent Amount Earned in 2023
		\$
		\$
		\$

- (4) Parent(s) had no taxable income from work and did not file and were not required to file a 2023 federal tax return. **Continue to complete (5).**
- (5) I certify that I/we did not file and were not required to file a 2023 federal income tax return and that attempts to obtain a Verification of Non-Filer Form from the IRS were unsuccessful. The non-filer is: ___ parent 1 ___ parent 2 ___ both parents.

Signature

I/we certify that all information reported on this form is complete and correct. I/we understand that changes in my FAFSA information based on the documentation provided may result in a change in financial aid eligibility. **Please note: Signatures must be handwritten (ink signatures). Electronic signatures, either typed or with a stylus, are not acceptable.**

Student Signature Date
Ink signature is required. E-signature is not acceptable.

Parent Signature (required for dependent students) Date
Ink signature is required. E-signature is not acceptable.

Scan and email this form and all required documents to fnaid@carlow.edu, upload to your Self-Service record, or mail to Carlow University, Financial Aid Office, 3333 Fifth Avenue, Pittsburgh, PA 15213.

Instructions for Obtaining Tax Documents

****Recommended****

FAFSA IRS Direct Data Exchange (DDX)

The most efficient way to provide your IRS tax information is by using the IRS Direct Data Exchange (DDX) within your FAFSA application. In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to **studentaid.gov**
- Log in and go to the Account Dashboard.
- Select "Action Required" under "My Activity" section.
- Provide consent and approval.
- Navigate through the form.
- Sign and submit the section of the form.



IMPORTANT: If you successfully used the IRS Direct Data Exchange, you do not need to submit a Tax Return or Tax Return Transcript.

Options for Getting Your IRS Tax Return Transcript, if available

Online Request

- Go to **IRS.gov**
- On the IRS homepage, select "Get Your Tax Record."
- Select "Get Transcript ONLINE" or "Get Transcript by MAIL."
- Make sure to request the "IRS Tax Return Transcript," and NOT the "IRS Tax Account Transcript."

Telephone Request

- 1-800-908-9946

Paper Request Form

- IRS Form 4506T-EZ or IRS Form 4506-T

Options for Getting Your IRS Verification of Non-Filing, if available

Online Request

- Go to **IRS.gov**
- On the IRS homepage, select "Get Your Tax Record."
- Select "Get Transcript ONLINE" or "Get Transcript by MAIL."
- Request "Verification of Non-Filing"

Paper Request Form

- IRS Form 4506-T

Tax Filers with Special Circumstances

- **Individuals who filed an amended IRS Income Tax Return:** Provide a copy of the IRS tax return transcript or a signed copy of the tax return and a signed copy of the IRS Form 1040X.
- **Individuals who were victims of tax administration identity theft:** Call the IRS at 1-800-908-4490.
- **Individuals who filed non-U.S. Income Tax Returns:** Provide a signed copy of that income tax return(s); or a transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all the tax filer's income and tax information required to be verified for the tax year.
- **Divorced/Separated students or parents who filed "Married Filing Jointly"** must also attach W-2 Forms.
- **Married students or parents** must also submit a spouse's tax return even if not married in 2023.