

2022-2023 INDEPENDENT Form Spouse Income Verification South Dakota Public Higher Education

Black Hills State University ♦ Dakota State University ♦ Northern State University
South Dakota School of Mines & Technology ♦ South Dakota State University ♦ The University of South Dakota

Send all paperwork to:	
Enrollment Service Center (ESC) 414 East Clark St SL30 Vermillion, SD 57069-2390	FAX: (605) 677-6828 Phone: (605) 658-6160 or (800) 404-1547 E-mail: ESCFinAid@usd.edu

Please use blue or black ink to complete this document.

1. Student Information:

Last Name	First Name	M.I.	Student ID # or Last 4 digits of SSN
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2. Spouse Information:

Last Name	First Name	M.I.	Last 4 digits of Social Security #
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3. Spouse: Did you file a 2020 U.S. Federal Tax Return?

If YES:

Choose One

- I successfully used the Data Retrieval Tool on _____ (date).
- Attached is my 2020 IRS Tax Return Transcript.
- I have ordered a 2020 IRS Tax Return Transcript and will submit it when it is received.
- Attached is my **SIGNED** 2020 Federal Tax Return (including Schedules 1-3).

If NO:

Choose One

- I did not earn income during 2020 and I am not required to file a 2020 Federal Tax Return. **Attached** is my IRS Verification of Non-filing Letter.
- I am not required to file a 2020 Federal Tax Return but did earn income during 2020. **Attached** are my 2020 W-2s (or my 2020 IRS Wage and Income Transcript) **AND** my IRS Verification of Non-filing Letter.

NON-FILERS ONLY List the Names of ALL the Spouse's Employers	Enter the Amount Earned from each Employer in 2020	W-2 OR IRS Wage & Income Transcript Attached? (circle one)
		W-2 or IRS Wage & Income Transcript
		W-2 or IRS Wage & Income Transcript
		W-2 or IRS Wage & Income Transcript

4. Certification of signature: **SENDING WITHOUT A SIGNATURE WILL DELAY THE FINANCIAL AID PROCESS. Typed signatures NOT accepted.**

By signing this worksheet, I certify that all information reported on this form to qualify for Federal aid is complete and correct.

Spouse Signature	Date
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WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Instructions for Providing Tax Documentation

Use the IRS Data Retrieval Tool (DRT) on the FAFSA:

1. Go to studentaid.gov
2. Log in to your 2022-23 FAFSA
3. Select "Make FAFSA Corrections"
4. Navigate to the Financial Information section (for both the student and parent, if applicable)
5. Answer a few questions and then click "Proceed to the IRS" to transfer 2020 IRS income tax information into your FAFSA.
6. Successfully transferring your tax information using the IRS DRT returns you to your FAFSA.
7. You must re-sign the FAFSA and submit the updated information.

Please Note: If you are providing a copy of a 2020 Federal Tax Return it must be **signed**. If you filed an amended return in 2020, you would also need to submit a **signed** copy of your IRS Form 1040X.

If you are unable to use the IRS Data Retrieval Tool

Some students and parents may be unable to use the IRS DRT. Examples of these situations include: (1) Your marital status changed after December 31, 2020, (2) You filed your tax return as "married filing separately" and indicated a status of "married/re-married" when completing the FAFSA, and (3) You filed a foreign tax return.

If you are unable to use the IRS DRT, you can submit a **signed** copy of your 2020 tax return. If you did not keep a copy of your tax return, here are some options. **Please note that due to COVID-19 restrictions, not all options may be available in your area.**

- Access the tax software product you used to prepare and file your 2020 return. You may be able to access your account to download/print a copy.
- Contact the tax preparer/provider who filed your 2020 return if you used a tax professional.
- Access your tax transcript (a summary) at irs.gov/individuals/get-transcript.
 - Click "Get Transcript Online" to register, then print or download your transcript immediately.
 - Click "Get Transcript by MAIL" to receive your transcript in 5 to 10 calendar days.
- Call the automated line at 800-908-9946 to order a transcript by mail.
- Submit a Form 4506-T, Request for Transcript of Tax Return, to the IRS via fax or mail to order a transcript to be mailed to you. Allow at least 2-4 weeks for delivery.
- You may be able to go directly to your local IRS office for an in-person request. You must call to make an appointment to obtain a transcript in person. To find a listing of IRS offices in your area, go to: <http://www.irs.gov/uac/Contact-Your-Local-IRS-Office-1>.

If you did not file a 2020 Tax Return, you will need to submit a 2020 IRS Verification on Non-filing Letter (dated 10/1/21 or after).

- Access your Non-filing Letter at irs.gov/individuals/get-transcript.

Send all requested documents to:

Enrollment Service Center
414 E Clark St SL30
Vermillion SD 57069
Fax #: 605-677-6828
Email: ESCFinAid@usd.edu

When providing federal tax documents by email, be sure to redact (black out) all Social Security Numbers displayed on the documents.