



## **How to Provide Financial Information - Dependent**

*Per Federal Regulations, this information is required for all individuals on the 2025-2026 FAFSA.*

### **W-2's**

**Copies of all 2023 W-2's are required for all individuals where the FA-DDX was unsuccessful OR you are a non-filer**

- All students and parents who worked and earned income for 2023 who were either non-filers OR were unsuccessful using the FA-DDX must provide copies of all 2023 W-2 forms issued to the student/parent and the parent's spouse by their employers.
- For those unable to obtain W-2's, you must go to the IRS website (<https://irs.gov/individuals/get-transcript/>) and obtain a "2023 Wage and Income Transcript" that will be accepted in lieu of missing W-2's.

### **-AND-**

### **TAX INFORMATION**

*(Both the student and the parent(s) appearing on the FAFSA must provide **one** of these documents)*

#### **1. Update your 2025-2026 FAFSA using the FA-DDX (Future Act Direct Data Exchange)**

- Go to [studentaid.gov](https://studentaid.gov), log into your FAFSA record, select "Make FAFSA Corrections"; make sure that you and your parent(s) identification information is correct and that all contributors have granted consent. Please note if the FA-DDX did not work for you, you will be prompted to enter tax information manually and will need to provide another method of tax information to our office for verification.

*\*NOTE: The FA-DDX does not transfer all data elements to the FAFSA, therefore you **may** still be required to provide our office with a copy of your federal tax return (1040, Schedules 1, 3, and Schedules C, F, and/or Form 8863) upon request.*

#### **2. Provide a signed copy of your 2023 (1040) Tax Return**

- Per Federal Guidance beginning 1/9/2022 you may submit a **signed copy** of your federal (2023) 1040 tax return in lieu of obtaining the Tax Return Transcript. **This is to include the federal 1040 (signed), Schedules 1, 3, Schedule C, F, and/or Form 8863 as applicable.**
  - **NOTE:** The tax filer must provide an (actual) signature where indicated OR have a valid Tax Preparer's ID and EIN listed on your tax return. An electronic (PIN) signature is not acceptable.

#### **3. Provide a 2023 IRS Tax Return Transcript**

- To obtain a 2023 IRS Tax Return Transcript, go to <https://www.irs.gov/Individuals/Get-Transcript> or call 1-800-908-9946. (You will need your SSN, date of birth, and the address used on your 2023 taxes)
- Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript" for the tax year ending December 31, 2023.

### **NON-TAX FILERS**

**If the FA-DDX Did Not Transmit Tax Data, Provide a Non-Filing Letter from the IRS as well as copies of all 2023 W-2's (if it did, then you only need to provide earnings information)**

1. Log onto [www.irs.gov/transcript](https://www.irs.gov/transcript) and click on "Request by MAIL" (you may try the "Request Online" option, however, some non-filers have difficulty with this option). Select "Return Transcript", and choose the tax year ending December 31, 2023  
**OR**  
Download the IRS Form 4506-T at [www.irs.gov/pub/irs-pdf/f4506t.pdf](https://www.irs.gov/pub/irs-pdf/f4506t.pdf) and follow the instructions on the form.
2. All non-tax filers must still provide copies of all 2023 W-2's and provide us information on all sources of income/financial support (see instructions above for W-2 request steps)



Student's Name: \_\_\_\_\_

SU ID: \_\_\_\_\_

**C. STUDENT INCOME INFORMATION**

Check the applicable boxes below then submit the corresponding documents requested.	Submit the following documents																		
<input type="checkbox"/> I have filed or will file a 2023 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA FA-DDX <input type="checkbox"/> 2023 Tax Return Transcript <input type="checkbox"/> <b>Signed</b> copy of (2023) 1040 tax return	- Update your FAFSA using the FA-DDX - Provide a 2023 Tax Return Transcript - Provide a <b>signed copy</b> of your (2023) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, F, K-1 (Form 1065), and/or Form 8863 <b>AND</b> all 2023 W-2's if the FA-DDX was unsuccessful																		
<input type="checkbox"/> I did not work and am not required to file a 2023 Federal Income Tax Return.	No documentation required.																		
<input type="checkbox"/> I received income but am not required to file a 2023 Federal Income Tax Return.  The student received earnings and/or financial support in 2023. List below the names of all income sources including the source of this income, the amount earned from each employer in 2023, and whether an IRS W-2 form is provided – list every employer or source of financial support even if they did not issue a W-2. Provide copies of all 2023 IRS W-2 forms issued to the student by their employers. If more space is needed, provide a separate page with the student's name and ID number at the top.																			
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #d3d3d3;">Income Source OR Employer's Name</th> <th style="background-color: #d3d3d3;">Annual Amount Earned in 2023</th> <th style="background-color: #d3d3d3;">IRS W-2 Provided?</th> </tr> </thead> <tbody> <tr> <td><i>EXAMPLE: Mary's Bakery and Café</i></td> <td style="text-align: center;">\$2,000</td> <td style="text-align: center;">Yes</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td><b>Total Amount of Income Earned From Work in 2023</b></td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table>		Income Source OR Employer's Name	Annual Amount Earned in 2023	IRS W-2 Provided?	<i>EXAMPLE: Mary's Bakery and Café</i>	\$2,000	Yes										<b>Total Amount of Income Earned From Work in 2023</b>	\$	
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**D. PARENT INCOME INFORMATION**

Check the applicable boxes below then submit the corresponding documents requested.	Submit the following documents															
<input type="checkbox"/> I have filed or will file a 2023 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA FA-DDX <input type="checkbox"/> 2023 Tax Return Transcript <input type="checkbox"/> <b>Signed</b> copy of (2023) 1040 tax return	- Update your FAFSA using the FA-DDX - Provide a 2023 Tax Return Transcript - Provide a <b>signed copy</b> of your (2023) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, F, K-1 (Form 1065), and/or Form 8863 <b>AND</b> all 2023 W-2's if the FA-DDX was unsuccessful															
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<input type="checkbox"/> I received income am not required to file a 2023 Federal Income Tax Return. You must provide a non-filing letter from the IRS or have a successful FA-DDX transmission. **  One or both parents received earnings and/or financial support in 2023. List below the names of all income sources including the source of this income, the amount earned from each source in 2023, and whether an IRS W-2 form is provided – list every employer or source of financial support even if they did not issue a W-2. Provide copies of all 2023 IRS W-2 forms issued to the parent(s) by their employers. If more space is needed, provide a separate page with the student's name and ID number at the top.																
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**Certification and Signature:** Each person signing this worksheet certifies that all of the information reported is complete and accurate.

\_\_\_\_\_  
Student Signature - **required**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature - **required**

\_\_\_\_\_  
Date

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