

Name: _____ Student ID Number: _____

Step 3 – Rollover in 2023

Did the student have a rollover from an IRA, annuity or pension in 2023?

Yes No

If yes, what was the amount of the rollover?

Did the student’s spouse, if applicable, have a rollover from an IRA, annuity, or pension in 2023?

Yes No

If yes, what was the amount of the rollover?

Step 4-Student’s Tax Filing Status – Calendar Year 2023

Have you or will you be required to file a 2023 US Federal Income Tax Return, US Territory, or Foreign National Tax Return?

YES. Submit the *Direct Data Exchange* through your FAFSA **or** submit your *IRS Tax Return Transcript*, which you can request from the IRS at <https://www.irs.gov/individuals/get-transcript>. Continue to Step 4

NO, but I had some earnings from work. Complete, and submit a *Student Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance’s website. Be sure to include all 2023 W-2 and 1099 forms you received. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at <https://www.irs.gov/individuals/get-transcript>. Continue to Step 5.

NO, and I had no earnings from work. Complete, and submit a *Student Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance’s website. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at <https://www.irs.gov/individuals/get-transcript>. Continue to Step 5, if applicable, or Step 6.

Step 5 – Spouse’s Tax Filing Status – Calendar Year 2023

If you are married, has your spouse filed or will be required to file a 2023 US Federal Income Tax Return, US Territory, or Foreign National Tax Return?

YES. Submit the *Direct Data Exchange* through your FAFSA **or** submit your *IRS Tax Return Transcript*, which you can request from the IRS at <https://www.irs.gov/individuals/get-transcript>. Continue to Step 5.

NO, but I had some earnings from work. Complete, and submit a *Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance’s website. Be sure to include all 2023 W-2 and 1099 forms you received. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at <https://www.irs.gov/individuals/get-transcript>. Continue to Step 5.

NO, and I had no earnings from work. Complete, and submit a *Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance’s website. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at <https://www.irs.gov/individuals/get-transcript>. Continue to Step 6.

Step 6 – Certification

By signing this worksheet, I certify all the information reported is complete and correct (Must be a wet signature, you cannot electronically sign this form):

Student Signature

Date

Spouse Signature (if married)

Date