

[illegible]

Student's Name: _____ G#: _____

C. Verification of 2023 Income Information for Parent Tax Filers

A. **TAX RETURN FILERS - Apply to each parent in the household.** Complete this section if your parent(s) filed or will file a 2023 Income Tax Return with the IRS.

- ☐ 1. The parents **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2023 IRS income tax return information into the student's FAFSA. *The Grambling State University Financial Aid Office will use the IRS information that was transferred in the verification process.*
- ☐ 2. The parents are **unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2023 IRS Tax Return Transcript(s)**. Signature is not required. *To obtain a 2023 IRS Tax Return Transcript, go to www.irs.gov, under the Tools heading click "Request a Return Transcript" and **NOT** the "Account Transcript", or call 1-800-908-9946.*
- ☐ 3. I am **unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school a signed copy of my 2023 income tax return that was submitted to the IRS.
- ☐ 4. The parents are required to file a 2023 IRS income tax return and have been **granted a filing extension** by the IRS. The parents will provide the following documents:
 - ☐ a. A signed statement listing the sources of any 2023 income tax and the amount of income from each source;
 - ☐ b. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
 - ☐ c. A copy of IRS Form W-2 for each source of 2023 employment income received or an equivalent document; **AND**
 - ☐ d. If self-employed, the signed statement must indicate the amount of estimated AGI and U.S. income tax paid for tax year 2023.
- ☐ 5. The parents **filed an amended** IRS income tax return for tax year 2023. I will provide a signed copy of the 2023 IRS form 1040X, "Amended US individual Income Tax Return," filed with the IRS that include the change(s) made by the IRS, in addition to one of the following:
 - ☐ a. Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
 - ☐ b. A transcript obtained from the IRS that lists 2023 tax account information of the tax filer(s); or.
 - ☐ c. A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.
- ☐ 6. The parents are a **victim of identity theft** and have been unable to obtain a **2023 IRS Tax Return Transcript** or use the IRS Data Retrieval Tool. The parents will provide the following documents:
 - ☐ a. A signed copy of the 2023 Income Tax return and applicable schedules the individual filed with the IRS; **AND**
 - ☐ b. An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.
- ☐ 7. Parent(s) are an individual **who filed or will file a 2023 income tax return with the relevant taxing authority of a U.S. territory, commonwealth**, (e.g., Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), **or with a foreign central government**. Parent(s) will provide a signed copy of the 2023 tax account information issued by the tax authority.

B. **NON-TAX RETURN FILERS — Apply to each parent in the household.** Complete this section if the parent **will not file** and is **not required** to file a 2023 Income Tax Return with the IRS. **Note: We may require you to provide documentation from the IRS that indicated a 2023 IRS income tax return was not filed with the IRS.** Check the box that applies:

- ☐ I (if married, and my spouse) was not employed and had no income earned from work in 2023. **(must complete a 2025-2026 Low Income Form. Form can be found at www.gram.edu/finaid**
- ☐ I (if married, and/or my spouse) was employed in 2023 and have listed below the names of all my employers, and the amount earned from each employer in 2023, whether an IRS W-2 form is provided. **Please attach copies of all 2023 IRS W-2 forms issued by your employers along with a non-filing statement.** If more space is needed, attach a separate page with student's name and G Number at the top

Employer's Name	IRS W-2 Provided?	2023 Amount Earned
ABC's Auto Body Shop (example)	Yes (example)	\$2,000.00 (example)
Total Amount of Income Earned from Work		\$

Student's Name: _____ G#: _____

D. Verification of 2023 Income Information for Student Tax Filers

A. TAX RETURN FILERS - Apply to the student. Complete this section if you filed or will file a 2023 Income Tax Return with the IRS.

- ☐ 1. I **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2023 IRS income tax return information into the student's FAFSA. *The Grambling State University Financial Aid Office will use the IRS information that was transferred in the verification process.*
- ☐ 2. I am **unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2023 IRS Tax Return Transcript(s)**. Signature is not required. *To obtain a 2023 IRS Tax Return Transcript, go to www.irs.gov, under the Tools heading click "Request a Return Transcript" and **NOT** the "Account Transcript", or call 1-800-908-9946*
- ☐ 3. I am **unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school a signed copy of my 2023 income tax return that was submitted to the IRS.
- ☐ 4. I am required to file a 2023 IRS income tax return and have been **granted a filing extension** by the IRS. I will provide the following documents:
- ☐ a. A signed statement listing the sources of any 2023 income tax and the amount of income from each source
 - ☐ b. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
 - ☐ c. A copy of IRS Form W-2 for each source of 2023 employment income received or an equivalent document; **AND**
 - ☐ d. If self-employed, the signed statement must indicate the amount of estimated AGI and U.S. income tax paid for tax year 2023
- ☐ 5. I **filed an amended** IRS income tax return for tax year 2023. I will provide a signed copy of the 2023 IRS form 1040X, "Amended US individual Income Tax Return," filed with the IRS that include the change(s) made by the IRS, in addition to one of the following
- ☐ a. Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
 - ☐ b. A transcript obtained from the IRS that lists 2023 tax account information of the tax filer(s); or .
 - ☐ c. A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.
- ☐ 6. I am a **victim of identity theft** and have been unable to obtain a **2023 IRS Tax Return Transcript** or use the IRS Data Retrieval Tool. I will provide the following documents:
- ☐ a. A signed copy of the 2023 Income Tax return and applicable schedules the individual filed with the IRS; **AND**
 - ☐ b. An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.
- ☐ 7. I am an individual **who filed or will file a 2023 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, (e.g., Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign central government.** I will provide a signed copy of the 2023 tax account information issued by the tax authority.

B. NON TAX RETURN FILERS — Apply to the student. Complete this section if you **will not file** and is **not required** to file a 2023 Income Tax Return with the IRS. **Note: We may require you to provide documentation from the IRS that indicated a 2023 IRS income tax return was not filed with the IRS.** Check the box that applies:

- ☐ I was not employed and had no income earned from work in 2023.
- ☐ I was employed in 2023 and have listed below the names of all my employers, and the amount earned from each employer in 2023, whether an IRS W-2 form is provided. **Please attach copies of all 2023 IRS W-2 forms issued by your employers along with a non-filing statement.** *If more space is needed, attach a separate page with student's name and G Number at the top.*

Employer's Name	IRS W-2 Provided?	2023 Amount Earned
<i>ABC's Auto Body Shop (example)</i>	<i>Yes (example)</i>	<i>\$2,000.00 (example)</i>
<i>Total Amount of Income Earned from Work</i>		<i>\$</i>

Student's Name: _____ G#: _____

E. Identity and Statement of Educational Purpose (To Be Signed at Grambling State University)

The student must appear in person at Grambling State University to
(Name of Postsecondary Educational Institution)

verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose
(Printed Student's Name)

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Grambling State University for 2025-2026.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Authorized Financial Aid Administrator's Signature)

(Date)

Identity and Statement of Educational Purpose

(To be Signed in the Presence of a Notary)

NOTE: This section is required ONLY if form is NOT completed in person

If the student is unable to appear in person at Grambling State University to verify his or her identity, the student must provide to the institution:

- A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- The **original** Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

State of _____

City/County of _____

On _____, before me, _____,
(Date) (Notary's Name)

personally appeared, _____, and proved to me
(Printed name of signer)

Notary Seal

on the basis of satisfactory evidence of identification _____
(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(Notary Signature)

My commission expires on _____ .
(Date)

Student's Name: _____ G#: _____

F. Certification and Signature

Signing below, I certify that all of the information reported on this worksheet is complete and correct.
The student must sign and date this worksheet.

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

Student's Signature

Date

Spouse's Signature (optional)

Date

*Submit this worksheet to the Financial Aid Office at
Grambling State University*

You should make a copy of this worksheet for your records.