



How to Provide Financial Information - Dependent

Per Federal Regulations, this information is required for all individuals on the 2024-2025 FAFSA.

W-2's

Copies of all 2022 W-2's are required for all individuals

- All students and parents who worked and earned income for 2022 must provide copies of all 2022 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 "2022 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 2024-2025 FAFSA using the FA-DDX (Future Act Direct Data Exchange)

- Go to 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, E, and/or F) upon request.

2. Provide a signed copy of your 2022 (1040) Tax Return

- Per Federal Guidance beginning 1/9/2022 you may submit a **signed copy** of your federal (2022) 1040 tax return in lieu of obtaining the Tax Return Transcript. **This is to include the federal 1040 (signed), Schedules 1-3, Schedule C, E, and/or F 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 2022 IRS Tax Return Transcript

- To obtain a 2022 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 2022 taxes)
- Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript" for the tax year ending December 31, 2022.

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 2022 W-2's

1. Log onto 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, 2022
OR
Download the IRS Form 4506-T at 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 2022 W-2's (see instructions above)



In response to your submission of the 2024-2025 Free Application for Federal Student Aid (FAFSA), the U.S. Department of Education has required the Office of Financial Aid to collect the following information from you. Submission of all of the requested information is required in order to receive federal student aid. Please complete and return these materials to the Office of Financial Aid as quickly as possible.

A. Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's SU ID Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			

B. Family Information

- ☐ By checking this box I indicate that my family size as transferred by the FA-DDX (Future Act Direct Data Exchange) for my parent's 2022 tax year correctly reflects my family's size (Please complete the chart below to also indicate the number in college for our records.)
- ☐ By checking this box I indicate that the FA-DDX information from 2022 needs adjustments and my corrected family information is provided in the chart below. This is because:

Please list your family by full name and relationship below, providing the following information and members:

- Yourself
- Your parent(s) (including step-parent) who provide more than 50% of your support
- Your parent(s)' other dependents children if (a) your parent(s) will provide more than half of their support from July 1, 2024, through June 30, 2025, or (b) the children would be required to provide parental information when completing the FAFSA excluding unborn children.
- Other people if they now live in your parent(s) household and your parent(s) provide more than half of their support and will continue to provide more than half of their support from July 1, 2024, through June 30, 2025
- For all family members, please also list those who will be enrolled *at least half-time* in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2024 and June 30, 2025.
- *If more space is needed, attach a separate page with the student's name and SU ID Number at the top.*

***NOTE:** Please do not list parental college information below, as it will be disregarded for financial aid purposes.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half-Time
John Doe (example)	18	Brother	Example University	Yes
		Self	Shenandoah University	

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 2022 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA FA-DDX <input type="checkbox"/> 2022 Tax Return Transcript <input type="checkbox"/> Signed copy of (2022) 1040 tax return <p style="text-align: center;">AND</p> Did the student file an amended (changed) tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No	- Update your FAFSA using the FA-DDX - Provide a 2022 Tax Return Transcript - Provide a signed copy of your (2022) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, and/or F as applicable AND all 2022 W-2's If YES , you must submit: 2022 FA-DDX Successful Transmittal OR 2022 Signed 1040X with all Schedules as filed AND 2022 Tax Return Transcript/ Signed 1040 and all W-2's																		
<input type="checkbox"/> I did not work and am not required to file a 2022 Federal Income Tax Return.	No documentation required.																		
<input type="checkbox"/> I worked but am not required to file a 2022 Federal Income Tax Return. The student was employed in 2022. List below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form is provided – list every employer even if they did not issue a W-2. Provide copies of all 2022 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%;"> <thead> <tr> <th>Employer's Name</th> <th>Annual Amount Earned in 2022</th> <th>IRS W-2 Provided?</th> </tr> </thead> <tbody> <tr> <td><i>EXAMPLE: Mary's Bakery and Café</i></td> <td style="text-align: center;"><i>\$2,000</i></td> <td style="text-align: center;"><i>Yes</i></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>Total Amount of Income Earned From Work in 2022</td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table>		Employer's Name	Annual Amount Earned in 2022	IRS W-2 Provided?	<i>EXAMPLE: Mary's Bakery and Café</i>	<i>\$2,000</i>	<i>Yes</i>										Total Amount of Income Earned From Work in 2022	\$	
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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 2022 Federal Income Tax Return and submit the information by using the: <input type="checkbox"/> FAFSA FA-DDX <input type="checkbox"/> 2022 Tax Return Transcript <input type="checkbox"/> Signed copy of (2022) 1040 tax return <p style="text-align: center;">AND</p> Did the parent(s) file an amended (changed) tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No	- Update your FAFSA using the FA-DDX - Provide a 2022 Tax Return Transcript - Provide a signed copy of your (2022) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, and/or F as applicable AND all 2022 W-2's If YES , you must submit: 2022 FA-DDX Successful Transmittal OR 2022 Signed 1040X with all Schedules as filed AND 2022 Tax Return Transcript/ Signed 1040 and all W-2's																		
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<input type="checkbox"/> I worked but am not required to file a 2022 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 were employed in 2022. List below the names of all employers, the amount earned from each in 2022, and whether an IRS W-2 form is provided – list every employer even if they did not issue a W-2. Provide copies of all 2022 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. <table border="1" style="width: 100%;"> <thead> <tr> <th>Employer's Name</th> <th>Annual Amount Earned in 2022</th> <th>IRS W-2 Provided?</th> </tr> </thead> <tbody> <tr> <td><i>EXAMPLE: Tom's Tree Removal Services</i></td> <td style="text-align: center;"><i>\$8,500</i></td> <td style="text-align: center;"><i>Yes</i></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>Total Amount of Income Earned From Work in 2022</td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table>		Employer's Name	Annual Amount Earned in 2022	IRS W-2 Provided?	<i>EXAMPLE: Tom's Tree Removal Services</i>	<i>\$8,500</i>	<i>Yes</i>										Total Amount of Income Earned From Work in 2022	\$	
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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.