

STEP 2:

Tax Forms and Income Information

You are encouraged to use the IRS Data Retrieval Tool to transfer information to your FAFSA. If you do not use the IRS Data Retrieval, you **should** submit a 2022 Federal tax transcript from the IRS by visiting www.irs.gov/transcript or calling **1-800-908-9946** or a signed copy of your 2022 Federal tax return.

Instructions: Please check the appropriate box that applies to your filing status:

To Be Completed by **STUDENT (Dependent/Independent):** (Please check the appropriate box)

- I filed a 2022 Federal Income Tax Return and used the IRS Data Retrieval Tool, **or** attaching a copy of my 2022 IRS Tax Return Transcript or a signed copy of the 2022 Federal Tax Return.
- My spouse and I filed a 2022 Federal Income Tax Return. (If filed separately, you both must submit a copy of the 2022 IRS Tax Return Transcript or a signed 2022 Federal Tax Return).
- I filed an amended tax return for 2022. If yes, I am attaching a copy of the tax return transcript or 2022 Federal Tax Return and a signed 1040X.
- I was not employed and not required to file a 2022 Federal Income Tax Return. **(Independent Students Only) A copy of the IRS Non-Tax Filer Letter must be submitted.**
- I was employed in 2022 (**Yearly amount earned \$ _____**) and not required to file a 2022 Federal Tax Return. **(SUBMIT all 2022 W2's if earned income from work.) (Independent Students Only must submit a copy of the IRS Non-Tax Filer Letter.)**

To Be Completed By **PARENT(S):** (Please check the appropriate box)

- I/We filed a 2022 Federal Income Tax Return and used the IRS Data Retrieval Tool, **or** attaching a copy of the 2022 IRS Tax Return Transcript or a signed copy of the 2022 Federal Tax Return.
- My spouse and I filed a 2022 Federal Income Tax Return. (If filed separately, you both must submit a copy of the 2022 IRS Tax Return Transcript or a signed 2022 Federal Tax Return).
- I/We filed an amended tax return for 2022? If yes, I am attaching a copy of the tax return transcript or 2022 Federal Tax Return and a signed 1040X.
- I/We were not employed and not required to file a 2022 Federal Income Tax Return. **(A copy of the IRS Non-Tax Filer Letter must be submitted.)**
- I/We were employed in 2022 (**Yearly amount earned \$ _____**) and not required to file a 2022 Federal Tax Return. **(SUBMIT all 2022 W2's if earned income from work.) (A copy of the IRS Non-Tax Filer Letter must be submitted.)**

For Non-Tax Filer (Parent(s) Only) If your parents did not file a 2022 tax return, please submit a copy of their 2022 Non-Filer Letter from the IRS.

For Non-Tax Filer (Independent Student/Spouse Only) If you and your spouse did not file a 2022 tax return, please submit a copy of you and your spouse 2022 Non-Filer Letter from the IRS.

Instructions for obtaining an IRS Verification of Non-Filing Letter:

All non-tax filers are required to provide an IRS Verification of Non-Filing Letter dated on or after October 1, 2022, that indicates that a 2022 IRS income tax return was not filed with the IRS. After receiving the Verification of Non-Filing Letter from the IRS, include the student's Banner ID, then submit to the The Office of Financial Aid and Scholarships.

- **Paper Request Form-** [IRS Form 4506-T](https://www.irs.gov/efile/irs-form-4506-t)- complete lines 1-4, check box 7, enter 12/31/2022 for box 9, check signatory attestation box, sign, date, and submit to the IRS as instructed. Mail or fax to your respective IRS location depending upon your state of residence as shown on page 2 of the 4506-T form.
- **Online Request** - Go to www.irs.gov/transcript, and then choose either "Get Transcript Online" or "Get Transcript by Mail." Get transcript online will give you instant delivery via PDF, whereas get transcript by mail, you will receive a copy within 5-10 business days. Make sure to request a 2022 Verification of Non-Filing Letter.
- **Telephone Request** - 1-800-908-9946, after following prompts, select option 2 to request an IRS Verification of Non-Filing Letter and then enter "2022."

Name _____

ID# _____

STEP 3: Student and Parent's 2022 Untaxed Income**Independent Student:** Please indicate below any of the following that apply to **you (and your spouse)** for the 2022 tax year.**Dependent Student:** Please indicate below any of the following that apply to you and **your parent(s)** for the 2022 tax year.**If left blank, the value is assumed to be "0" for processing.**

Sources of Untaxed Income	Student/Spouse	Parent
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Do not include amounts reported in code DD (employer contributions toward employee health benefits).	\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from schedule 1-total of lines 16+20.	\$	\$
Child support received for any of your children. (yearly amount) Do not include foster care or adoption payments.	\$	\$
Tax exempt interest income from IRS Form 1040-line 2a.	\$	\$
Untaxed portions of IRA distributions and pensions from IRS Form 1040 - line 4b + 5b) Exclude rollovers. If negative, enter a zero here.	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing. (yearly amount)	\$	\$
Veterans' non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. (yearly amount)	\$	\$
Other untaxed income not reported in items 41a through 41g, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13. Do not include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$	\$
Earnings from work under a cooperative education program (co-op) offered by a college. (yearly amount)	\$	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form (yearly amount). Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. Do not enter untaxed combat pay.	\$	\$
Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040 Schedule 3 – Line 3.	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment.	\$	\$
Taxable student grants and scholarship aid reported to IRS in you and/or your parents adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship, portions of fellowships and assistantships. A tax return must have been filed.	\$	\$

Name _____

ID# _____

(Please Check All Applicable Boxes Below)

STEP 4: Child Support Paid

- **Child Support** - Did you, one or both of your parents listed in the household on Step 1 pay child support in 2022?
 Yes No (If yes, complete the section below)

Name of Person Who Paid Child Support	Name of Person to Whom Child Support Was Paid	Name of Child for Whom Support Was Paid	Date of Birth for Whom Child Support Was Paid	Yearly Amount of Child Support Paid in 2022
				\$
				\$
				\$
				\$

STEP 5: Required Signatures

Certification

By signing below, each person certifies that all the information reported on this form is complete and correct.

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

Please provide a hand-written signature (not a computer-generated signature)

Student Signature _____ Date _____

Parent Signature _____ Date _____ Relationship to Student _____
(For dependent students)

Mail or email signed completed form to:

**Saint Augustine’s University
 The Office of Financial Aid and Scholarships
 1315 Oakwood Ave
 Raleigh, North Carolina 27610
 Telephone #: 919-516-4000
 financialaid@st-aug.edu**

Saint Augustine’s University does not discriminate against employees, students, or applicants based on age, color, disability, gender, gender identity, gender expression, national origin, political affiliation, race, religion, sexual orientation, genetic information, veteran status, or any other basis protected by law.