

**2023-2024**  
**Marital Status/Tax Filing Worksheet for Students**  
**Instruction Sheet**

**Priority Deadline:**  
Returning Students: Return by **April 1, 2023**  
for maximum aid consideration  
New Students: Return by **June 1, 2023** for  
maximum aid consideration.

The information you provide will be compared to the Free Application for Federal Student Aid (FAFSA). If there are differences, our office will submit corrections to your FAFSA electronically. This instruction sheet is for you to keep for your records.

In the first section of this form, you, the student, will confirm your marital status and the date this status became effective.

In the next section of the form, you, the student, will clarify your tax filing status. You must submit your 2021 **federal tax return transcript** or a **signed** copy of your 2021 federal tax return (1040), including all schedules, that you filed with the IRS.

The remainder of the form collects and clarifies federal tax return information.

Below are a couple of options for requesting a transcript. It may take up to two weeks for IRS income information to be available for electronic IRS tax return filers and six to eight weeks for paper IRS tax return filers.

**IRS Online Tax Return Transcript Request:** <http://www.irs.gov/Individuals/Get-Transcript>

**IRS Automated Phone Transcript Service:** **1-800-908-9946**

**If you and or your spouse (if applicable) are not required by law to file a federal tax return you will need to provide the following:**

1. A copy of IRS Form W-2 for each source of 2021 employment income received or an equivalent document such as the Wage and Income Transcript. Wage and Income Transcripts can be obtained at [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript); **and**
2. IRS Verification of 2021 Non-filing Letter dated on or after October 1, 2022.

An IRS Verification of Non-filing Letter can be obtained online using the [IRS Get Transcript service](#). If the individual cannot obtain one online, it must be requested by mail. Check box 7 on the [IRS Form 4506-T, Request for Transcript of Tax Return](#), and mail it to the IRS. If appropriate, a similar confirmation from another taxation authority (e.g., a U.S. territory or a foreign government) is also acceptable.

For the security of your personal information, the Virginia Tech Office of University Scholarships and Financial Aid does not accept completed forms sent via email. Please return completed forms to us via the document uploader, <https://finaid.vt.edu/documentuploader.html>, or by fax, 540-231-9139

## 2023-2024 Marital Status/Tax Filing Worksheet for Students

Student ID Number: \_\_\_\_\_ Email: \_\_\_\_\_

Student's Full Legal Name: \_\_\_\_\_, \_\_\_\_\_  
(Please print clearly) Last First Middle

Your current marital status:  Married/Remarried  Separated  Divorced  Widowed Effective date of status change \_\_\_\_\_ / \_\_\_\_\_  
Month Year

Please check the statement below that applies to you.

- I, the student, filed my 2021 taxes with a status **other than married filing joint**. Please skip the remaining questions below, **sign** the 2<sup>nd</sup> page of this form, and return it along with a copy of your 2021 IRS Tax Return Transcript.
- I, the student, filed my 2021 taxes with a filing status of **married filing joint**. Please complete, sign, and return this entire form along with a copy of your 2021 IRS Tax Return Transcript and all 2021 W2s.
- I, the student **have not and will not file a tax return** for 2021. Note: Those who will not and are not required to file federal income tax returns are required to provide a Letter of Non-filing from the IRS. This can be requested at <https://www.irs.gov/individuals/get-transcript>

Please complete this section **only** if your marital status is something other than **married** and you filed a **married filing joint** federal tax return for 2021.

Tax Return Item Income Section	1040 Line Number	Amount Attributed to the Student
Wages, Salaries, Tips (found on W2 form)	1 + Sch. K-1 Box 14 (code A)	\$
Taxable Interest	2b	\$
Ordinary Dividends	3b	\$
IRA Distributions	4b	\$
Pensions and Annuities	5b	\$
Taxable Social Security Benefits	6b	\$
Capital Gain/Loss	7	\$
Taxable Refunds, Credits, or Offsets	Sch.1 Line 1	\$
Alimony Received	Sch.1 Line 2a	\$
Business Income/Loss	Sch. 1 Line 3	\$
Other Gains	Sch. 1 Line 4	\$
Rents, Royalties, Partnerships	Sch. 1 Line 5	\$
Farm Income/Loss	Sch. 1 Line 6	\$
Unemployment Compensation	Sch. 1 Line 7	\$
Other Income	Sch. 1 Line 9	\$



Tax Return Item Adjusted Gross Income Section	1040 Line Number	Amount Attributed to the Student
Educator Expenses	Sch. 1 Line 11	\$
Business Expenses	Sch. 1 Line 12	\$
Health Savings Account Deduction	Sch. 1 Line 13	\$
Moving Expenses	Sch. 1 Line 14	\$
Deductible part of Self-Employment Tax	Sch. 1 Line 15	\$
Self-Employed SEP, SIMPLE, and Qualified Plans	Sch. 1 Line 16	\$
Self-Employed Health Insurance Deduction	Sch. 1 Line 17	\$
Penalty on Early Withdrawal of Savings	Sch. 1 Line 18	\$
Alimony Paid	Sch. 1 Line 19a	\$
IRA Deduction	Sch. 1 Line 20	\$
Student Loan Interest Deduction	Sch. 1 Line 21	\$
Archer MSA Deduction	Sch. 1 Line 23	\$
Other Adjustments	Sch. 1 Line 25	\$

Tax, Credits, and Payments	1040 Line Number	Amount Attributed to the Student
Education Credits from Form 8863, line 19	Sch. 3 Line 3	\$

Asset Information (as of the date you filed the FAFSA)	Student Amount (whole dollars only)	Spouse (if applicable) (whole dollars only)
Balance of Cash, Savings, and Checking	\$	\$
Net worth of Investments ( <i>Value minus debt equals net worth</i> )	\$	\$
Net worth of Business and/or Farm ( <i>Value minus debt equals net worth</i> )	\$	\$

**Additional Comments (optional):** (please use this space to provide any explanation of the figures provided above)

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

**Student Signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
No electronic or typed signatures

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