

2023-2024 Verification of Amended IRS Tax Return



Office of Scholarships and Financial Assistance

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Student information

_____ Last name	_____ First name	_____ Middle initial	_____ Northwest 919 number	
_____ Address	_____ City	_____ State	_____ ZIP	_____ Phone Number

Individuals who filed an amended federal income tax return and utilized the IRS Data Retrieval Tool (DRT) to complete their FAFSA may not rely on that tax information. In this case, the documentation listed below is required to complete and satisfy verification.

The U.S Department of Education's objective for requesting additional information is to ensure that financial aid eligibility determinations are made based on the most accurate information possible. However, the FAFSA on the Web IRS Data Retrieval Tool (DRT) will only transfer tax information from an original tax return and does not include any information from an amended tax return. Similarly, the IRS Tax Return Transcript only includes information from the original tax return. Therefore, when an institution is aware that an amended tax return was filed, the institution will need to use information from both documents listed below to complete and satisfy the verification requirements.

Please provide **both** of the following to our office:

- Either the tax information linked to the FAFSA using the **IRS Data Retrieval Tool** or a **2021 IRS Tax Return Transcript** that includes information from the original tax return that can be requested directly from the IRS. Please see the instructions on the IRS Tax Filer Verification Instructions.
- A **signed** copy of the **2021 IRS Form 1041X**, (Amended U.S. Individual Income Tax Return) that was filed with the IRS.

Certification statement

By signing, I certify that all information reported is complete and accurate.

_____ Student Signature (required)	_____ Date	_____ Parent Signature (required for dependent students)	_____ Date
_____ Spouse Signature (if married)	_____ Date		

Warning: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both