



## Uncommon Situations- Verification Student/Student Spouse

You and/or your spouse have been selected to verify your income information for the 2022 tax year. Complete this form if you, the student and/or spouse (if married) have an uncommon situation for the 2022 tax year.

*Notify the financial aid office if you had a change in marital status after December 31, 2022.*

_____	_____
Student Name	CWU Student ID#:

### Instructions:

- **Complete page 1-2 of this form-** see pg. 3 for instructions on retrieving tax data from the IRS.
- **Print and Sign forms (if required)-** Student signature is not required if uploaded to MyCWU portal and verification is for the student only (no other contributors on your FAFSA were selected). If your spouse was selected for verification, your spouse **must print form and provide handwritten signature**. If you do not have access to a printer, you may request a form be mailed to you. Email: [financialaid@cwu.edu](mailto:financialaid@cwu.edu)
- **Upload form and required documentation to your CWU To-Do list-** the CWU office will not upload forms for students.

### Please select one of the following:

- Student Only:** I am providing the information for myself only. I am either not married or my spouse was not asked to verify their information.
- Student's Spouse Only:** I am married to the student and completing this form. I am providing tax information for myself only.
- Student and Spouse:** I am married and providing information for me and my spouse. I am completing this form with my spouse to provide tax information for the 2022 tax year.

**Important:** To be eligible for federal aid, you, the student, and all contributors are required to consent and approve data sharing and importing income/tax information from the IRS to the FAFSA form. This includes your spouse (if married) or your parent/s (if you are a dependent student). When using the Federal Tax Information (FTI) transfer, most cases do not require further documentation. Even if data sharing and import are unsuccessful or student/spouse/parents filed taxes separately in 2022, all must provide consent to be eligible for Federal aid.



Choose one option and submit the required documentation:

- Option 1: Filing Extension (granted by the IRS):** I have consented for the FTI for my 2022 tax information to my or my spouse’s FAFSA, but it was unsuccessful. I have been granted a filing extension by the IRS beyond the automatic six-month extension for the 2022 tax year and attached the following documentation:
  - Required:* A signed statement listing the sources of any/all my 2022 income and the amount of income from each source.
  - Required:* A copy of the IRS’s approval of my extension beyond the automatic six-month extension for the 2022 tax year
  - Required:* A copy of the IRS Form W-2 for each source of employment income received (or equivalent records) for 2022.
  - Required if Self Employed:*** I am self-employed and provided a signed statement certifying the amount of my Adjusted Gross Income (AGI) and U.S. income tax paid for the 2022 tax year.
  
- Option 2: Amended Tax Return(s):** I have consented for the FTI transfer for my 2022 tax information to my or my spouse’s FAFSA, but it was unsuccessful. I have amended my tax return for the 2022 tax year and made corrections using the 1040x form. I have attached the following documentation:
  - Required:* A signed copy of the 2022 IRS Form 1040X (Amended U.S. Individual Income Tax Return)
  - Required: One of the following:*
    - Updated income and tax information from the IRS on a FAFSA record with original tax information from 2022.
    - A 2022 IRS Tax Return Transcript (including the information from my original tax return)
    - A signed copy of my 2022 IRS Form 1040 and all schedules (if filed).
  
- Option 3: Victim of Identity Theft:** I have consented for the FTI transfer for my 2022 tax information to my or my spouse’s FAFSA, but it was unsuccessful due to being a victim of identity theft for the 2022 tax year. I have attached the following documentation:
  - Required:* A Tax Return Database View (TRDBV) transcript obtained from the IRS, or an equivalent document provided by the IRS or a copy of a signed 2022 tax return and schedules (if filed)
  - Required Contest:* By checking this box and signing/uploading this document, I contest I was a victim of IRS tax related identity theft, and the IRS is aware of the tax-related identity theft.
  
- Option 4: Non-IRS Income Tax Return:** I have consented for the FTI transfer to transfer my 2022 tax information to my or my spouse’s FAFSA, but it was unsuccessful because I filed a non-IRS income tax return. I have provided the following required documentation:
  - Required:* Signed copy of income tax return that was filed with a tax authority that was not the IRS. I understand that it is at the discretion of the FAO to request further tax account information that was issued by the tax authority on my return before verification can be completed.

<b>Certification- Student</b>	
I understand that submitting this form electronically through <b>MyCWU portal</b> constitutes my signature and my certification that the information provided herein is complete and correct.	
Student Signature (not required if submitted through your MyCWU portal)	Date
<b>Certification-Spouse (must sign in married)</b>	
By signing below, I certify all information reported is complete and correct.	
Spouse Signature (handwritten signature is required)	Date