

Student Name: _____

Student ID Number: _____

A. INDEPENDENT STUDENT'S INCOME INFORMATION TO BE VERIFIED

1. TAX FILERS (only complete this section if you filed taxes in 2023)

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the CIA Office of Financial Aid if the student or spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

Instructions: Complete this section if the student and spouse filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. **In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.**

If 2023 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

A **2023 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript ONLINE** - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Paper Request Form** – Use the links to download IRS Form [4506T-EZ](#) or IRS Form [4506-T](#). The transcript is generally received within 10 business days from the IRS's receipt of the online request

2. NONTAX FILERS (only complete this section if you DID NOT file taxes in 2023)

The instructions and certifications below apply to the student and spouse, if the student is married.

Complete this section if the student and spouse will not file and are not required to file a 2023 income tax return with the IRS.

Check the box that applies:

- The student and/or spouse were not employed and had no income earned from work in 2023.
- The student and/or spouse was employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is provided. [Provide copies of all 2023 IRS W-2 forms issued to the student and/or spouse by their employers]. List every employer even if they did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	2023 Amount Earned	IRS W-2 Attached?
ABC Shipping (example)	\$1,280	Yes

Student Name: _____

Student ID Number: _____

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2023 income tax return.

Statement: _____

Signature: _____ Date: _____

CERTIFICATION AND SIGNATURE(S)

Each person signing below certifies that all of the information reports is complete and correct. The student and on parent whose information was reported on the FAFSA must sign and date. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison or both.**

The student must sign and date this form.

Student's Signature

Date

Spouse's Signature (optional)

Date

Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the:

Cleveland Institute of Art
Financial Aid Office
11610 Euclid Avenue
Cleveland, OH 44106
financialaid@cia.edu

Student Name: _____

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Information About Special Tax Situations

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023, must provide:

- A signed statement listing the sources of any 2023 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2023; and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2023.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A 2023 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Database View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed