



**2023 Tax & Income Information** *To be completed by the student*

If you have an **Unusual Tax Filing Circumstance**, please indicate the circumstance, and see Pages 4 & 5 for additional instructions.

Check the options that apply:

I, the student, and/or my spouse (if applicable) have filed a 2023 Federal Income Tax Return, **AND**

- I/we have used or will use the **IRS Data Retrieval Tool** in FAFSA to transfer my/our 2023 IRS income tax information into my FAFSA, **OR**
- I/we have provided or will provide a copy of my **2023 Tax Return Transcript** from the IRS (See Page 4) or a signed copy of my/our **2023 federal income tax return and applicable schedules**

**OR**

I, the student, and/or my spouse (if applicable) have not filed, and I/we are not required to file a 2023 Federal income tax return, **and** I/we have provided or will provide a **Verification of Non-Filing Letter** from the IRS (see Page 4) **AND**

- I/we have no income earned from work in 2023, **OR**
- I/we earned income from work in 2023. I/We have listed below the names of all employers, the amount earned from each employer in 2023, and I/We have provide or will provide **copies of ALL 2023 W-2(s) or a 2023 Wage & Income Transcript** from the IRS for each source of income listed.

**Section D: Identity and Statement of Educational Purpose** – *Please review this entire section prior to completion as there are very specific steps that must be followed.*

The student must appear **in person** at Dominican University of California in the Office of Financial Aid to verify their identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution auofoM M

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and  
(Print Student's name)  
that the Federal student financial assistance I may receive will only be used for educational purposes and to pay  
the cost of attending Dominican University of California for 2025-2026.

\_\_\_\_\_  
Student Signature Date Student ID Number

\_\_\_\_\_  
*To be completed by a notary if the student is unable to appear in person at Dominican University of California.*

State of \_\_\_\_\_ City/County of \_\_\_\_\_ on \_\_\_\_\_,  
(Date)

before me, \_\_\_\_\_, personally appeared, \_\_\_\_\_,  
(Printed name of signer)

and proved to me on basis of satisfactory evidence of identification \_\_\_\_\_  
to be the above-named person who signed the foregoing instrument. (Type of government-issued photo ID provided)

**WITNESS my hand and official seal**

\_\_\_\_\_  
(Notary signature)

(Seal)

My commission expires on \_\_\_\_\_  
(Date)

**CERTIFICATION** *To be completed by the student. The following signatures certify that all of the information reported on this worksheet is complete and correct. WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.*

\_\_\_\_\_  
Student Signature (required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (optional)

\_\_\_\_\_  
Date

## **Instructions for Providing Tax Information**

### **Instructions for using the IRS Data Retrieval Tool (DRT) in FAFSA**

1. Login to the student's FAFSA with the student's FSA ID.
2. In the Parent and/or Student Financial Information Section, complete the questions about whether taxes have been filed, the filing status, and whether a Puerto Rican/foreign tax return were filed for 2023.
3. If you are eligible to use the DRT, a "LINK TO IRS" button should appear. Click it.
4. On the next page, click on the "PROCEED TO IRS SITE" button.
5. Your name and information should appear on the IRS site. Enter your information and address **exactly** as it appears on your 2023 Federal Income Tax Return. Click submit.
6. You will be taken to a page that confirms which items will be transferred from the IRS to the FAFSA.

### **Individuals who filed an Amended Return**

An individual who amended a U.S. Income Tax Return for tax year 2023 needs to provide the following documents:

**Signed and dated** copy of the 2023 IRS Form 1040X that was filed with the IRS, **AND**

- Tax information submitted in the FAFSA using the **IRS Data Retrieval Tool, OR**
- A **2023 IRS Tax Return Transcript, OR**
- A signed copy of the **2023 IRS Form 1040 and the applicable schedules** that were filed with the IRS

### **Individuals who are Victims of Tax Administration Identity Theft**

An individual who was the victim of IRS tax-related identify theft must provide the following items:

- 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 IRS Form 1040 and applicable schedules.
- A statement signed and dated by the tax filer indicating that he/she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identify 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 their income tax return that was filed with the relevant tax authority. However, if the Office of Financial Aid questions the accuracy of the information on the signed copy