



Sam Houston State University

Financial Aid and Scholarships Office

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

INCOME TAX WORKSHEET 2022-2023

If you make any corrections, white outs, or alterations to any of your information on this form, you MUST initial next to it.

Student Name (blue or black ink only): Sammy Bearkat SAM ID: 000123456

Incomplete verification packets will NOT be accepted.

SECTION A: STUDENT SECTION

Did the STUDENT/STUDENT'S SPOUSE file a **2020** tax return with the IRS?

Must choose one:

Already filed a tax return

Worked but will not file a tax return.

➤ **Must attach All W-2's/1099's/Schedule C's AND**

➤ **Independent students must** attach a Verification of Non-Filing Letter from IRS

Did not work. Must attach:

➤ **Independent students must** attach a Verification of Non-Filing Letter from IRS

SECTION B: PARENT SECTION

Did the PARENT(S) file a **2020** tax return with the IRS?

Must choose one:

Already filed a tax return

Worked but will not file a tax return. Must attach:

➤ All W-2's/1099's/Schedule C's **AND**

➤ Verification of Non-Filing Letter from IRS

Did not work. Must attach:

➤ Verification of Non-Filing Letter from IRS

Options on how to link taxes to the FAFSA, obtain a Tax Return Transcript, Wage & Income Transcript, or Verification of Non-Filing letter from IRS:

IRS Data Retrieval Tool: Link 2020 taxes to FAFSA by using the IRS Data Retrieval Tool on www.fafsa.ed.gov .	Request Online: Visit www.irs.gov and click "Get Your Tax Record."	Order by Phone: Call 1-800-908-9946	In Person: Visit your local IRS office. www.irs.gov to search locations.	By Mail: Complete form 4506-T <i>*This form can also be used to obtain a Verification of Non-Filer Letter from the IRS. Note the 4506-T is submitted to IRS, not Financial Aid and Scholarships Office.</i>
--	---	---	--	--

If you filed an amended tax return (1040X) provide the following: ➤ Signed copy of 1040X ➤ Original Tax Return Transcript	If you are a victim of tax identity theft who is unable to obtain a 2020 Tax Return Transcript you must contact the IRS at 1-800-908-4490.
--	---

WARNING: If you purposely give false or misleading information you may be fined, sentenced to jail, or both. Each person signing below certifies that all of the information is complete and correct.

Student Signature: Sammy Bearkat

Date: 08/01/22

Parent Signature: Samuel Bearkat

Date: 08/01/22



Return completed form to: Financial Aid and Scholarships Office
 Email: PDF from SHSU Email to fadocuments@shsu.edu • Fax: 936.294.3668
 Mail: Box 2328, Huntsville TX 77341-2328