

C. Independent Student's/Spouse's Income (Complete Section 1 or 2)

Section 1. If you completed a 2021 Federal Income Tax Return check only one box below

If the student and spouse file separate 2021 IRS income tax returns, a 2021 IRS Tax Return Transcript must be provided for both.

- Check here if you (student and spouse) completed the IRS data retrieval process either on your initial FAFSA or when making corrections to the FAFSA.
- Check here if you (student and spouse) are attaching a copy of your 2021 IRS Tax Return Transcript **or** a signed copy of your 2021 Federal Income Tax Return, including Schedules 1-3, if applicable.

Section 2. If you did not file and are not required to file a 2021 Federal Income Tax Return check only one box below:

- The student (spouse) was not employed and had no income earned from work in 2021.
- The student (spouse) was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 or 1099 form is attached. Provide copies of all 2021 IRS W-2 and/or 1099 forms issued to the student. List every employer even if the employer did not provide an IRS W-2 or 1099 form. Provide a signed statement explaining the reason if unable to obtain an IRS W-2 or 1099 form for income earned from employer. If more space is needed, attach a separate page with the student's name and ID number at the top.

(Do not complete if you are a tax filer)

Employer's Name	2021 Amount Earned	IRS W-2 or 1099

If the student and/or spouse did not file a 2021 income tax return with the IRS, provide "Verification of Nonfiling Letter" from the IRS. See instructions below on how to obtain this

**Identity and Statement of Educational Purpose
(To Be Signed at the Institution)**

The student must appear in person at Hartwick College to verify his or her 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
- valid 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 authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Hartwick College for the 2023–2024 year.

Student's Signature _____

Student's ID Number _____ Date _____

Financial Aid Administrator _____ Date _____

NOTE: If you cannot appear in person to complete this form, you must provide a notarized Statement of Educational Purpose Form along with a signed, written statement indicating the reasons for your non-availability. Please contact the Financial Aid Office if you are unable to complete this form in person.

E. Certification and Signatures

Each person signing this form certifies that all the information reported on it is complete and correct. The student and spouse in the primary household must sign (not electronic or digital) and date below.

Student's Signature

Date

Spouse's Signature

Date

INDEPENDENT STUDENTS (NOT REQUIRED TO FILE): HOW TO OBTAIN THE IRS NON-FILING LETTER

- a. Go to www.irs.gov, click “Get Your Tax Record.”
- b. Click “Get Transcript ONLINE” (If at any point, you cannot validate your identity – for example you cannot provide financial verification information or you lack access to a mobile phone – you will need to use the Get Transcript by MAIL option, see below for instructions).
- c. Enter the non-filer’s Social Security Number (you can use your ITIN or EIN), e-mail address, filing status, account numbers for loan or credit card associated with your name, and mobile phone associate with your name. This information will be used to verify your identity with the IRS.
- d. Click “Continue”.
- e. Select “Verification of Non-filing Letter” for TAX YEAR 2021 f. If successfully validated, you will be able to view your IRS Verification of Non-filing letter that you can print for submission.

IRS DRT INSTRUCTIONS

If you have questions or need assistance, you may contact the FAFSA Helpline at 1-800-433-3243. Live agents are available to walk you through this process.

- a. Log in to your current FAFSA form or start a new application at studentaid.gov
- b. In the finances section of the online form, you will see a “Link to IRS” button if you are eligible to use the IRS DRT.
- c. Click the “Link to IRS” button and log in with your FSA ID to be transferred to the IRS to retrieve your information.
- d. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the “Submit” button.
- e. Check the “Transfer My Tax Information into the FAFSA form” box, and click the “Transfer Now” button.
- f. You will know that your federal tax return information has been successfully transferred because the words “Transferred from the IRS” will display in place of the IRS information in your FAFSA form.

REQUEST TRANSCRIPT ONLINE

- a. Go to www.irs.gov, click “Get Your Tax Record.”
- b. Click “Get Transcript Online.” Make sure to request “Tax Return Transcript and NOT the “Account Transcript.”
- c. 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.)
- d. The transcript displays online upon successful completion of the IRS’s two-step authentication.