

**2022-2023 Verification of Student/Spouse**  
**2020 Employment and Wage Status**

Student Name: \_\_\_\_\_ RAM ID: \_\_\_\_\_

**INSTRUCTIONS:**

Complete and return this form to the Financial Aid Office only if you/your spouse did not file a 2020 federal income tax return and were not required to file a federal income tax return according to the IRS guidelines (see reverse side). Do not complete this form if you plan to file or if you are required to file a federal income tax return for 2020.

Check **all** below that apply:

- ☐ I (student/spouse) did not work during 2020 and did not file a federal tax return for 2020.
- ☐ I (student/spouse) did not work during 2020 and did not file a federal tax return for 2020. I (student/spouse) attempted to obtain a verification of non-filing letter from the IRS and was unable to do so.
- ☐ I (student/spouse) worked, but did not file a federal income tax return for 2020. I (student/spouse) earned \$\_\_\_\_\_ in 2020 and already submitted or \_\_\_\_\_am attaching a copy of (student/spouse) 2020 W-2(s).
- ☐ I (student/spouse) do not have a social security number, an individual taxpayer identification number, or an employer identification number and \_\_\_\_\_am attaching a signed statement listing the sources, amounts of earnings and other income received in 2020.

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Who Must File a Return?**

Whether you must file a return depends on your ***gross income, filing status, and age***.

**Gross Income**

Gross income includes all income that you receive in the form of money, goods, property, and services. It does not include any income that is tax-exempt.

**Filing Status**

Your filing status is determined on the last day of the tax year, which is December 31 for calendar year taxpayers. Your filing status will be determined by whether you are single or married, and what your family situation is.

**(Please see reverse side)**

## Age

If you are age 65 or older on the last day of the tax year, you are allowed a higher amount of gross income before you are required to file a return. The table below lists the income limit amounts for the 2020 tax year.

If your parents (or someone else) can claim you as a dependent, use this table to see if you must file a return. (See Table 1-3 for other situations when you must file.)

In this table, unearned income includes taxable interest, ordinary dividends, and capital gain distributions. It also includes unemployment compensation, taxable social security benefits, pensions, annuities, and distributions of unearned income from a trust. Earned income includes salaries, wages, tips, professional fees, and taxable scholarship and fellowship grants. (See Scholarships and fellowships in chapter 12.) Gross income is the total of your earned and unearned income.

Single dependents—Were you either age 65 or older or blind?

**No.** You must file a return if any of the following apply.

- Your unearned income was more than \$1,100.
- Your earned income was more than \$12,400.
- Your gross income was more than the larger of:
  - \$1,100, or
  - Your earned income (up to \$12,050) plus \$350.

**Yes.** You must file a return if any of the following apply.

- Your unearned income was more than \$2,750 (\$4,400 if 65 or older and blind).
- Your earned income was more than \$14,050 (\$15,700 if 65 or older and blind).
- Your gross income was more than the larger of:
  - \$2,750 (\$4,400 if 65 or older and blind), or
  - Your earned income (up to \$12,050) plus \$2,000 (\$3,365 if 65 or older and blind).

| If your filing status is ...              | and at the end of the year you were ...* | you must file if your gross income is at least ...** |
|---|--|--|
| Single                                    | under 65                                 | \$12,400   |
|   | 65 or older                              | \$14,050   |
| Married Filing Jointly***                 | under 65 (both spouses)                  | \$24,800   |
|   | 65 or older (one spouse)                 | \$26,100   |
|   | 65 or older (both spouses)               | \$27,400   |
| Married Filing Separately                 | any age                                  | \$5.00   |
| Head of Household                         | under 65                                 | \$18,650   |
|   | 65 or older                              | \$20,300   |
| Qualifying Widow(er) with Dependent Child | under 65                                 | \$24,800   |
|   | 65 or older                              | \$26,100   |

\* If you turn 65 on January 1, 2021, you are considered to be age 65 at the end of 2020.

\*\* Gross income means all income you received in the form of money, goods, property, and services that is not exempt from tax, including any income from sources outside the United States (even if you may exclude part or all of it). Do not include Social Security benefits unless you are married filing a separate return and you lived with your spouse at any time during 2020.

\*\*\* If you did not live with your spouse at the end of 2020 (or on the date your spouse died) and your gross income was at least \$5.00, you must file a return regardless of your age.