2023-2024 Verification Worksheet V-1 or V-5 (Dependent Student)

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Dependent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security Number
Student's Street Address (in	clude apt. no.)	Student's Date of Birth	
City	State	Zip Code	Student's Email Address
Student's Home Phone Nun	ber (include area code)	Student's Alternate or Cell Phone Number	

B. Dependent Student's Family Information

List below the people in your <u>parent(s)' household</u>. Include:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.
- Include the name of the college for any household member, excluding your parent(s), who will be enrolled, <u>at least half</u> <u>time</u> in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023, and June 30, 2024. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at
				Least Half Time
Missy Jones (example)	18	Sister	Central University	Yes
		Self		

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS—Important Note: If the student filed, or will file, an <u>amended</u> 2021 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student and spouse <u>filed or will file</u> a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at <u>FAFSA.gov</u>. In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.*

Check the box that applies:

The student <u>has used</u> the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2020 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.

The student <u>has not yet used</u> the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2021 IRS income information into the student's FAFSA once the student has filed a 2021 IRS tax return.

The student is <u>unable or chooses not to</u> use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2021 IRS tax return transcript**—<u>not</u> a photocopy of the income tax return.

A 2021 IRS Tax Return Transcript may be obtained through:

• <u>Get Transcript by MAIL</u> – Go to <u>www.irs.gov</u>, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

• <u>Get Transcript ONLINE</u> – Go to <u>www.irs.gov</u>, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax 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.

• <u>Automated Telephone Request</u> – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

• <u>Paper Request Form</u> – 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 paper request form.

Check here if the student's IRS tax return transcript is attached to this worksheet.

Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

2. TAX RETURN NONFILERS—Complete this section if the student, will not file and is <u>not required</u> to file a 2021 income tax return with the IRS.

Check the box that applies:

The student was not employed and had no income earned from work in 2021.

The student was employed in 2021 and has listed below the names of all the student's employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Attach copies of all 2021 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	\$2,000.00(example)	Yes(example)

Student's Name:

SSN:

1. TAX RETURN FILERS—Important Note: If the student's parent(s), filed or will file, an <u>amended</u> 2021 IRS tax return the student's financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if the parents filed or will file a 2021 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. **Check the box that applies:**

The student's parent <u>has used</u> the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.

The student's parent <u>has not yet</u> used the IRS Data Retrieval Tool, but will use the tool to transfer 2021 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed.

The parent <u>is unable or chooses not to</u> use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2021 IRS tax return transcript(s)**—<u>not</u> photocopies of the income tax return.

A 2020 IRS Tax Return Transcript may be obtained through:

• <u>Get Transcript by MAIL</u> – Go to <u>www.irs.gov</u>, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

• <u>Get Transcript ONLINE</u> – Go to <u>www.irs.gov</u>, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax 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.

• <u>Automated Telephone Request</u> – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

• <u>Paper Request Form</u> – 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 paper request form.

Check here if an IRS tax return transcript(s) is attached to this worksheet.

Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and <u>is not required</u> to file a 2021 income tax return with the IRS.

Check the box that applies:

The parent(s) was not employed and had no income earned from work in 2021.

The parent(s) was employed in 2021 and has listed below the names of all the parent's employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Attach copies of all 2021 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

Student's Name:

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

____ Check here if confirmation of non-filing is provided.

_____ Check here if confirmation of non-filing will be provided later.

E. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature

Date

Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school.

You should make a copy of this worksheet for your records.