

2023-2024 Verification Worksheet - Dependent Student

Verification Tracking Group V5 – Aggregate Verification

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 reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

A. Dependent Student’s Information

Last Name, First Name	Student’s Identification (ID) Number
Street Address (include apt. no.)	Date of Birth
City	State
Zip Code	Email Address
Home Phone Number (include area code)	Alternate or Cell Phone Number

B. Dependent Student’s Family Information

Number of Household Members: List below the people in the parent’s household. Include:

- Yourself (the student).
- The parents (including a stepparent) even if the student does not live with the parents.
- The parents’ other children if the parents will provide more than half of the children’s 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 the children do not live with the parents.
- Other people if they now live with your parents, and your parents provide more than half of the other people’s support and will continue to provide more than half of their support through June 30, 2024.

Number in College: For any household member, *excluding* the parents, who is, or will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024 include the name of the college.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

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Student: _____ Student ID Number: _____
Last Name, First Name

C. Dependent Student's Verification of 2021 IRS Income Tax Return Information for Student Tax Filers

1. **TAX RETURN FILERS — Important Note:** The instructions below apply to the student. If you (the student) filed or will file an amended 2021 IRS tax return, or had a change in marital status after December 31, 2021, you must contact your financial aid administrator before completing this section.

Instructions: Complete this section if you, the student filed or will file a 2021 IRS income tax return with the IRS. *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. If you have not already used the tool, go to FAFSA.gov.* In most cases, no further documentation is needed to verify 2021 IRS income tax return 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:

- I, the student, have used the IRS DRT in *FAFSA on the Web* to transfer my 2021 IRS income tax return information into my FAFSA.
- I, the student, have not yet used the IRS DRT in FAFSA on the Web but I will use the tool to transfer my 2021 IRS income tax return information into my FAFSA. *We cannot complete the verification process until your IRS information has been transferred into your FAFSA.*
- I, the student, am unable or choose not to use the IRS DRT in *FAFSA on the Web*, and I will instead submit to the school a **2021 IRS Tax Return Transcript(s)** or a signed 2021 tax return copy(s) and applicable schedules that was submitted to the IRS.
- None of the Above

To obtain a **2021 IRS Tax Return Transcript:**

- **Online Request** - Go to www.irs.gov and click "Get Your Tax Record." 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.
- **Mail Request** – Go to www.irs.gov and click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Transcript receipt is about 10 business days from the IRS's receipt of the online request.

Use the Social Security Number and date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return).

- **Automated telephone request** - 1-800-908-9946. Transcript receipt is about 10 business days from the IRS's receipt of the telephone request.
- **Paper request** - IRS Form 4506T-EZ or 4506-T. Transcript receipt is about 10 business days from the IRS's receipt of the paper request.

Contact the financial aid office if more information is needed about obtaining an IRS Tax Return Transcript.

- Check here if a 2021 IRS Tax Return transcript(s) or signed income tax return copy and applicable schedules is provided with this worksheet.
- Check here if a 2021 IRS Tax Return transcript(s) or signed income tax return copy and applicable schedules will be provided later. *Verification cannot be completed until the IRS Tax Return transcript(s) or signed tax return copy have been submitted to the school.*

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Student: _____ Student ID Number: _____
Last Name, First Name

C. Dependent Student’s Verification of 2021 Earned Income Information for Student Nontax Filers

2. **TAX RETURN NONFILERS** — The instructions and certifications below apply to you (the student). Complete this section if you will not file and are not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- I, the student, was not employed and had no income earned from work in 2021.
- I, the student, was employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued to you by your employers]. List every employer even if the employer did not issue an IRS W-2 form.
- None of the Above

If more space is needed, provide a separate page with the student’s name and ID number at the top.

Employer’s Name	IRS W-2 or an Equivalent Document Provided?	2021 Annual Amount Earned
<i>Suzy’s Auto Body Shop (example)</i>	Yes	\$2,000.00
Total Amount of Income Earned from Work		\$

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Student: _____ Student ID Number: _____
Last Name, First Name

C. Dependent Student's Verification of 2021 IRS Income Tax Return Information for Parent Tax Filers

3. **TAX RETURN FILERS—Important Note:** The instructions below apply to the parent(s) included in the household. Notify the financial aid office if the parents filed or will file an amended 2021 tax return, separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.
- 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. If you have not already used the tool, go to FAFSA.gov.* Generally, no further documentation is needed to verify 2021 IRS income tax return 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 parents have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in FAFSA on the Web but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA. *We cannot complete the verification process until your IRS information has been transferred into your FAFSA.*
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2021 IRS Tax Return Transcript(s)** or a 2021 signed tax return copy(s) and applicable schedules that was submitted to the IRS.
- None of the Above

To obtain a **2021 IRS Tax Return Transcript**:

- **Online Request** - Go to www.IRS.gov and click "Get Your Tax Record." 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.
- **Mail Request** – Go to www.IRS.gov and click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Transcript receipt is about 10 business days from the IRS's receipt of the online request.

Use the Social Security Number and date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return).

- **Automated telephone request** - 1-800-908-9946. Transcript receipt is about 10 business days from the IRS's receipt of the telephone request.
- **Paper request** - IRS Form 4506T-EZ or 4506-T. Transcript receipt is about 10 business days from the IRS's receipt of the paper request.

Contact the financial aid office if more information is needed about obtaining an IRS Tax Return Transcript.

If the parents filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return transcripts must be provided for both.

- Check here if a 2021 IRS Tax Return transcript(s) or signed income tax return copy and applicable schedules is provided with this worksheet.
- Check here if a 2021 IRS Tax Return transcript(s) or signed income tax return copy and applicable schedules will be provided later. *Verification cannot be completed until the IRS Tax Return transcript(s) or signed tax return copy have been submitted to the school.*

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Student: _____ Student ID Number: _____
Last Name, First Name

C. Dependent Student’s Verification of 2021 Earned Income Information for Parent Nontax Filers

4. **TAX RETURN NONFILERS** — The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed and had no income earned from work in 2021.
- One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.
- None of the Above

If more space is needed, provide a separate page with the student’s name and ID number at the top.

Employer’s Name	IRS W-2 or an Equivalent Document Provided?	2021 Annual Amount Earned
<i>Suzy’s Auto Body Shop (example)</i>	Yes	\$2,000.00
Total Amount of Income Earned from Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022, that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

- Check here if confirmation of non-filing or a signed statement is provided.
- Check here if confirmation of non-filing or a signed statement will be provided later. *Verification cannot be completed until the document(s) have been submitted to the school.*

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D. Certifications and Signatures

Each person signing below certifies that all of the information reported on the pages of this document are complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information you may be fined, sent to prison, or both.

_____	_____
Print Student's Name	Student's ID Number
_____	_____
Student's Signature (Required)	Date
_____	_____
Parent's Signature (Required)	Date

NOTE: IMPORTANT! The following page (**Identity/Statement of Educational Purpose**) must be completed and **signed by the student in the presence of the designated individual at the school.** Failure to do so will delay further processing of your application for financial aid. If you have any questions, please contact your Financial Aid Administrator at the school. Only the English or Spanish version of the Identity/Statement of Educational Purpose is required to be signed.

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Student: _____ Student ID Number: _____
Last Name, First Name

Identity and Statement of Educational Purpose (To be signed at the Institution)

The student must appear in person at _____ to
(Name of Postsecondary Educational Institution)
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, 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 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.

Identity and Statement of Educational Purpose (To be signed in the Presence of a Notary)

If the student is unable to appear in person at _____
(Name of Postsecondary Educational Institution)
to verify his or her identity, the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that presented to a notary, such as, but not limited to a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I, _____, am the individual signing this
(Print Student's Name)
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 _____ for 2023-2024.
(Name of Postsecondary Educational Institution)

Student's Signature

Date

Student ID Number

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Verificación de Identidad y Declaración de Propósito Educativo (Para ser firmadas en la institución)

El estudiante debe comparecer en persona en _____ para
(Nombre de la institución educativa postsecundaria)
verificar su identidad mediante la presentación de una identificación con fotografía (ID) válida emitida por el gobierno que no haya expirado, como una licencia de conducir, otro tipo de identificación emitida por el estado o pasaporte, entre otros. La institución conservará una copia de la identificación con fotografía del estudiante en la cual se anotará la fecha en la que se recibió y revisó, y el nombre del funcionario de la institución autorizado a recibir y revisar las identificaciones de los estudiantes.

Además, el estudiante debe firmar, en presencia del funcionario de la institución, la Declaración de Propósito Educativo proporcionada a continuación.

Verificación de Identidad y Declaración de Propósito Educativo (Para ser firmadas en la presencia de un notario)

Si el estudiante no es capaz de comparecer en persona en _____
(Nombre de la institución educativa postsecundaria)
para verificar su identidad, el mismo debe proporcionar a la institución:

- (a) Una copia de la de identificación con fotografía (ID) válida emitida por el gobierno que no haya expirado, que se reconoce en la declaración del notario que aparece a continuación, o que se presenta ante un notario, como una licencia de conducir, otro tipo de identificación emitida por el estado o pasaporte, entre otros; y
- (b) La Declaración de Propósito Educativo original proporcionada a continuación debe ser notarizada. Si la declaración del notario aparece en una página separada de la Declaración de Propósito Educativo, se debe indicar de manera clara que la Declaración de Propósito Educativo era el documento notarizado.

Declaración de Propósito Educativo

Certifico que yo, _____, soy el individuo que firma esta
[Imprimir Nombre del Estudiante]
Declaración de Propósito Educativo, y que la ayuda financiera federal estudiantil
que yo pueda recibir sólo será utilizada para fines educativos y para pagar el costo
de asistir a _____ para 2023-2024.
[Imprimir Nombre de Institución Educativa Postsecundaria]

[Firma del Estudiante]

[Fecha]

[Número de Identificación del Estudiante]

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THIS PAGE **MUST** BE COMPLETED IF PAGE 7 (ENGLISH) OR PAGE 8 (SPANISH) AND THEIR CERTIFICATIONS WERE NOT ABLE TO BE SIGNED IN THE PRESENCE OF THE AUTHORIZED SCHOOL OFFICIAL. THE NOTARY CERTIFICATION/REQUIREMENT BELOW IS ONLY APPLICABLE TO PAGE 7 OR PAGE 8 IF THOSE PAGES ARE NOT SIGNED BY THE STUDENT IN THE PRESENCE OF THE DESIGNATED INDIVIDUAL AT THE SCHOOL.

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____,

(Date)

(Notary's name)

personally appeared, _____, and proved to me

(Printed name of signer)

because of satisfactory evidence of identification _____

(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing Statement of Educational Purpose.

WITNESS my hand and official seal

(Seal)

(Notary signature)

My commission expires on _____

(Date)