

# 2023-2024 Verification Worksheet - Independent 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. Independent Student’s Information

Last Name, First Name	Student’s Identification (ID) Number
Street Address (include apt. no.)	Date of Birth
City <span style="margin-left: 150px;">State</span> <span style="margin-left: 150px;">Zip Code</span>	Email Address
Home Phone Number (include area code)	Alternate or Cell Phone Number

### B. Independent Student’s Family Information

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

- Yourself.
- Your spouse, if you are married.
- Your or your spouse’s children if you or your spouse will provide more than half of their support from July 1, 2023 through June 30, 2024, even if the children do not live with you.
- Other people if they now live with you, and you or your spouse provides 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 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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Last Name, First Name

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

1. **TAX RETURN FILERS — Important Note:** If you (and/or your spouse, if married) filed, or will file, an amended 2021 IRS tax return, had a change in marital status after December 31, 2021, or if married, the student or spouse filed separate IRS income tax returns for 2021, you must contact your financial aid administrator before completing this section.

**Instructions:** Complete this section if you, the student (and/or your spouse, if married), 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 (and, if married, my spouse's) 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 (and, if married, my spouse's) 2021 IRS income tax return information into my FAFSA. *We cannot complete the verification process until your (and, if married, your spouse's) 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 (and, if married, my spouse's) **2021 IRS Tax Return Transcript(s) or a signed income 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](http://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](http://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 you and your spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return documents 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. Independent Student’s Verification of 2021 Income Information for Student Nontax Filers

2. **TAX RETURN NONFILERS** — The instructions and certifications below apply to you (the student) and/or your spouse, if you are married. Complete this section if you (and your spouse, if married) 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, (and, if married, my spouse) was not employed and had no income earned from work in 2021.
- I, the student, (and/or, if married, my spouse) 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 the student and spouse 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(s) 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.

**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

\_\_\_\_\_  
Spouse's Signature (Optional)

\_\_\_\_\_  
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 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 is 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's 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 notariada. 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 notariado.

### 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 5 (ENGLISH) OR PAGE 6 (SPANISH) AND THEIR CERTIFICATIONS WERE NOT ABLE TO BE SIGNED IN THE PRESENCE OF THE AUTHORIZED SCHOOL OFFICIAL. THE NOTARY CERTIFICATION BELOW IS ONLY APPLICABLE TO PAGE 5 OR PAGE 6 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)