

# 2023–2024 Verification Worksheet

## Independent Student – V5

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. 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 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. Independent Student’s Information

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

### B. Independent Student’s Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the child would be required to provide your 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 you.
- Other people if they now live with you and you 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 who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023, and June 30, 2024.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Marty Jones(example)</i>	<i>28</i>	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>	<i>Wagner College</i>	

*If more space is needed, attach a separate page with your name and ID number at the top.*

### C. Independent Student's Income Information to Be Verified

1. **TAX RETURN FILERS**— Complete the section below only if you, the student, (and, if married, your spouse), filed or will file a 2021 income tax return with the IRS.

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. For instructions on how to use the IRS Data Retrieval Tool or request a Tax Return Transcript, please see the last page.

**Check the box that applies:**

- I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2021 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- I, the student, have not yet used the IRS Data Retrieval Tool, but I will use the tool to transfer my (and, if married, my spouse's) 2021 IRS income information into my FAFSA.
- I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school a **2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules.**
  - Check here if an IRS tax return transcript or signed copy of tax return is attached to this worksheet.
  - Check here if an IRS tax return transcript or signed copy of tax return will be submitted to your school later. *Note that verification cannot be completed until this information has been submitted.*

- **Important Note:** If you (or your spouse, if married) filed, or will file, an amended 2021 IRS tax return, you must submit a signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

2. **TAX RETURN NONFILERS**— Complete the section below only if you, the student (and, if married, your spouse), will not file and is not required to file a 2021 income tax return with the IRS.

**Check the box that applies:**

- The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2021.
- The student (and/or the student's spouse, if married) did not file taxes but 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 form is attached. Attach copies of all 2021 W-2 forms issued to you (and, if married, to your spouse) by employers. *List every employer even if the employer did not issue an IRS W-2 form.*

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

*If more space is needed, attach a separate page with your name and ID number at the top.*

You must also provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2021 IRS income tax return was **not filed** with the IRS or other relevant tax authority.

- \_\_\_ Check here if confirmation of nonfiling is provided.
- \_\_\_ Check here if confirmation of nonfiling will be provided later.

Student's Name: \_\_\_\_\_ ID: \_\_\_\_\_

### D. Certification and Signature

**IMPORTANT:** To avoid a delay in processing, please review to make sure that every question has been answered and that you have provided all requested items. Additional information may be requested upon review of the initial documents submitted.

Each person signing below certifies that all of the information reported is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

\_\_\_\_\_  
Student's Signature (required)

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

*Please complete and bring all pages to the Office of Financial Aid.*

**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.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational  
(Print Student's Name)  
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)

**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 \_\_\_\_\_ to verify his or her identity,  
(Name of Postsecondary Educational Institution)  
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, 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.

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_  
City/County of \_\_\_\_\_  
On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Notary's name)  
personally appeared, \_\_\_\_\_, and provided to me  
(Printed name of signer)  
on basis of satisfactory evidence of identification, \_\_\_\_\_,  
(Type of government-issued photo ID provided)  
to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

\_\_\_\_\_  
Notary signature & date

\_\_\_\_\_  
Commission Expiration Date

## **Instructions for Providing Tax Data for Verification:**

There are two ways that families can elect to provide their tax information for the purposes of verification. If you are eligible to do so, the preferred method is to use the **IRS Data Retrieval Tool**. This tool links the information on your tax return directly to the FAFSA. Please note that if you recently filed your taxes or if you currently have an unpaid balance with the IRS, the retrieval tool may not be available to you.

Alternatively, families who are unable to use the Data Retrieval Tool may **contact the IRS to order a Tax Return Transcript**. You can request the transcript online, over the phone, or in person at your local IRS branch. Please be sure to request the "Tax Return Transcript" and **not** the "Tax Account Transcript" when communicating with the IRS.

## **Instructions for Using the IRS Data Retrieval Tool**

- Go to [www.FAFSA.gov](http://www.FAFSA.gov)
- Log into the student's FAFSA.
- Select "Make FAFSA Corrections."
- Under the Financial Information sections, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool.
- You will be redirected to the IRS website to authorize the transmittal.
- Be sure to save and resubmit the updated FAFSA.

## **Instructions for ordering a Tax Return Transcript**

- Go to [www.IRS.gov](http://www.IRS.gov)
- Select "Get your tax record."
- You may opt to "Get Transcript Online" or "Get Transcript by Mail."
- 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.
- If you select "Get Transcript by Mail," it may take up to 10 business days for you to receive the transcript.
- Make sure to request the "Tax Return Transcript." Do **not** select "Tax Account Transcript."
- You may also opt to use the IRS Automated Telephone Request service by dialing 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

