

2023 – 2024 DEPENDENT VERIFICATION WORKSHEET

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) has been selected for a review process called **verification**. Verification must be completed before federal financial aid can be awarded. Federal financial aid will be awarded upon completion of the entire verification process. Please complete and sign this form, attach all required documents, and submit to the address, fax, or email above. **Blank or incomplete forms will not be processed.** If you have questions about the process, please contact our office.

Important Note: Detailed instructions for the Verification of IRS Tax Data and Income Information are listed on Page 3 of this document. Please refer to these instructions when completing Section C and Section D.

For your protection, please remove all personally identifiable information (PII) such as: SSN, date of birth, and driver's license number from your documents prior to submitting them. Also, please include the student's name and VIP ID on all documents.

SECTION A: Student Information

Last Name	First Name	Middle Name	Student VIP ID
Email Address			Cell or Alternate Phone Number

SECTION B: Household Information

List the people in your FAFSA parent(s)' household, including:

- yourself
- your FAFSA parent(s) (including stepparent if applicable)
- your FAFSA parent(s)' other children if (a) your parent(s) will provide more than half of their support between July 1, 2023 and June 30, 2024, or (b) 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 FAFSA parent(s)
- other people if they now live with your FAFSA parent(s) and your FAFSA parent(s) provide(s) more than half of their support and will continue to provide more than half of their support between July 1, 2023 and June 30, 2024

Also, provide the name of the college for the household member(s) who will be attending college at least half-time between July 1, 2023 and June 30, 2024 and will be enrolled in a program that leads to a college degree, certificate, or diploma at a postsecondary educational institution (**do not provide college information for parent(s); however make sure the parent(s) is/are listed in the household**). Attach a separate sheet if needed.

Full Name	Age	Relationship	College
		self	

Student Name _____ Student VIP ID _____

Section C: FAFSA Parent(s) Tax Forms and Income Information-Fill out either Section 1 or Section 2

I/we am/are attaching all parent 2021 W-2s (this is required even if you have used the Data Retrieval Tool)

1. **PARENT TAX FILERS:** You must check at least one of the following. Please refer to instructions on page 3.
- I/we used the IRS Data Retrieval Tool to transfer parent 2021 tax data to the FAFSA
 - I/we am/are attaching a **signed** copy of the 2021 Federal 1040 Tax Return and schedules 1,2,3, C, or K if applicable
 - I/we am/are attaching a 2021 IRS Tax Return Transcript
 - I/we am/are active duty military, and have submitted the December 2021 Leave and Earnings Statement (LES)
 - I/we am/are attaching a **signed** copy of the 2021 amended tax return-1040-X (if applicable)
2. **PARENT NON-TAX FILERS:** You must check at least one of the following. Please refer to instructions on page 3.
- I/we have included an **IRS Verification of Non-Filing Letter** dated on or after October 1, 2022
 - I/we worked in 2021 but was/were not required to file taxes and have attached all 2021 W-2s and the **IRS Verification of Non-Filing Letter** dated on or after October 1, 2022

Sign here to certify that you **DID NOT** and **ARE NOT** required to file a 2021 U.S. Federal Tax Return:

Parent's Signature

Date

Section D: Student Tax Forms and Income Information-Fill out either Section 1 or Section 2

I am attaching all student 2021 W2s (this is required even if you have used the Data Retrieval Tool)

1. **STUDENT TAX FILERS:** You must check at least one of the following. Please refer to instructions listed on page 3.
- I used the IRS Data Retrieval Tool to transfer student 2021 tax data to the FAFSA
 - I am attaching a **signed** copy of my 2021 Federal 1040 Tax Return and schedules 1,2,3, C or K if applicable
 - I am attaching a 2021 IRS Tax Return Transcript
 - I am attaching a **signed** copy of my amended tax return (1040X)
2. **STUDENT NON-TAX FILERS:**
- I did not work or file taxes in 2021
 - I worked in 2021 but was not required to file taxes and have attached my 2021 W2s

Sign here to certify that you **DID NOT** and **ARE NOT** required to file a 2021 U.S. Federal Tax Return:

Student's Signature

Date

SECTION E: Certification and Signatures

Each person signing this worksheet certifies that all the information reported is true and accurate. For **dependent students**, only one parent must sign. **Warning: If you purposely give false or misleading information on this worksheet you may be fined, sentenced to jail, or both.**

Student's Signature

Date

FAFSA Parent's Signature (required)

Date

Instructions for the Verification of Tax Return Data and Income Information:

1. **TAX FILERS:** *Federal guidelines require students and parents to verify their 2020 Federal Tax Return Data using one of the following methods:*

Using the Data Retrieval Tool: The best way to verify tax return data is by using the IRS Data Retrieval Tool that is part of the FAFSA on the Web. Please be aware that you will not be able to see the tax data that is being imported into the FAFSA, but this is the fastest and easiest method to use. If you have not already used the tool, the parent and the student should go to FAFSA.gov, log in to the FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is/are eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into the FAFSA.

OR

Ordering a 2021 Tax Return Transcript: You may order a 2021 IRS tax return transcript online at: www.irs.gov. Click on "Get Transcript Online" or "Get Transcript by Mail" or call 1-800-908-9946 or mail 1 the paper Form 4506TEZ or 4506T. Be sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when your 2021 IRS tax return was filed). If your FAFSA parents are married and separate 2021 tax returns were filed, 2021 IRS tax return transcripts must be submitted for each parent. Submit the 2021 IRS tax transcript to the Financial Aid Office.

OR

Submitting a Signed Copy of the Filed 2021 Federal Tax Return if you are unable to use the IRS DRT: Students and the FAFSA parent(s) may submit a signed copy of their filed 2021 federal tax return to the Financial Aid Office. Include pages one and two of your return. Also, include copies of Schedule(s) 1, 2, 3, C, and K if filed.

2. **AMENDED TAX FILERS:** *Federal guidelines require students and parents who filed amended 2021 Federal Tax Returns to use one of the methods listed above and submit a signed copy of their 2021 Amended Tax Return (1040X) to the Financial Aid Office.*
3. **PARENT NON-TAX FILERS:** *Federal guidelines require the FAFSA parent(s) of dependent students to obtain an IRS Verification of Non-filing Letter dated on or after October 1, 2022 if they did not file a 2021 Federal Tax Return.* You may request the Verification of Non-filing Letter using the IRS "Get Transcript Online" tool, or by submitting IRS Form 4506-T and checking box 7. In addition, each non-filer must sign the TAX NON-FILER statement on this form and submit copies of all 2021 W-2 forms. (See Section C)
4. **STUDENT NON-TAX FILERS:** Dependent students are not required to obtain an IRS Verification of Non-filing Letter. Students who did not file a 2021 Federal Tax Return must sign the TAX NON-FILER statement on this form and submit copies of all 2021 W-2 forms. (See Section D)
5. **ALL TAX FILERS AND NON-TAX FILERS:**
All students and FAFSA parents are required to submit copies of all 2021 W-2(s), along with the rest of the required documentation. If parents are in the military, please submit the December 2021 Leave and Earnings Statement (LES).

CHECKLIST (please review to ensure you have all documents necessary for the verification to be completed in a timely manner)

- Parent(s) 2021 W-2s, 2021 tax Information.
- Student 2021 W-2s, 2021 tax Information.
- Copies of Schedule(s) 1, 2, 3, C, or K if applicable
- Copy of the December 2021 LES if applicable
- All sections are complete (Sections A, B, C, D, & E).
- All necessary signatures are provided.