

# 2023–2024 DEPENDENT VERIFICATION WORKSHEET (V1, V5)

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

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. Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's School 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. Student's Family Information

List below the people in your household. Include:

- Yourself (and 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. even if they do not live with you.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support and will continue to provide more than half of that person's 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 an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024.

Full Name	Age	Relationship	College enrolled in	Will be Enrolled at Least Half Time
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		<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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**C. Student's Income Information to Be Verified****1. Verification of 2021 Income Information for Student Tax Filers****Important Note:** The instructions below apply to the student and spouse if the student is married.

Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

**Instructions:** Complete this section if the student filed or will file a 2021 IRS income tax return. 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. *If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.***Check the box that applies:**

- The student has used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS Data Retrieval Tool but will use the tool to transfer 2021 IRS income information into the student's FAFSA once the student's IRS tax return has been filed.
- The student is unable or chooses not to use the IRS Data Retrieval Tool, and the student will provide the school a copy of the **2021 IRS tax return transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.**

A **2021 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by MAIL** – Go to [www.irs.gov](http://www.irs.gov), 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.
- **Get Transcript ONLINE** – Go to [www.irs.gov](http://www.irs.gov), 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.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – 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.

**2. Verification of 2021 Income Information for Students with Unusual Circumstances**

Complete this section if the student has filed or will file a 2021 income tax return with any of the following circumstances.

**Check the box that applies:**

- The student is required to file a 2021 IRS income tax return and **has been granted a filing extension by the IRS**, must provide:
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021.
  - Verification of Non-Filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2021 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation.
  - A copy of IRS Form W-2 for each source of employment income received for tax year 2021 **and**,
  - If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.
- The student has **filed an amended IRS income tax return** for tax year 2021, must provide:
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS; **and**
  - A 2021 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) **or** a signed copy of the 2021 IRS Form 1040 and the applicable schedules that were filed with the IRS **or** used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income information.
- The student **was the victim of IRS tax-related identity theft**, must provide:
- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that

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includes all the income and tax information required to be verified; *and*

- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

**3. Verification of 2021 Income Information for Student Nontax Filers**

Complete this section if the **student will not file** and is **not required** 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-2/1099 form is provided. Copies of all 2021 IRS W-2/1099 forms issued to the student by employers must be provided. *List every employer even if they did not issue an IRS W-2 form. Attach the W-2s/1099s and to this document with the student's name and Student ID Number at the top of each one.*

Employer's Name	IRS W-2 or equivalent attached?	Amount earned in 2021
<i>Suzy's Auto Body Shop (example)</i>	<i>Yes</i>	<i>\$2,000</i>
		\$
		\$
		\$
		\$
		\$
		\$
<b>Total Amount of Income Earned from Work</b>		<b>\$</b>

**Additionally, you must 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.**

\_\_\_\_\_ Check here if confirmation of non-filing is provided.

*Attach it to this document with the student's name and Student ID Number at the top.*

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

**D. Parent's Income Information to be Verified**

**Note:** If two parents were reported in Section B on page 1 of this worksheet, the instructions and certifications below refer and apply to both parents. Notify the financial aid office had a change in parents' marital status after December 31, 2021.

**1. Verification of 2021 Income Information for Parent Tax Filers**

**Instructions:** Complete this section if the parent(s) filed or will file a 2021 IRS income tax return. 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. *If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

**Check the box that applies:**

- The parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income information into the student's FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- The parent has not yet 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 is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will provide the school a copy of the **2021 IRS tax return transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.**  
*To obtain an IRS tax return transcript go to [www.irs.gov](http://www.irs.gov) and click "Get a Transcript" link under the Tools heading or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers.*  
***If the parents are married, and separate 2021 tax returns were filed, 2021 IRS tax return transcripts (or a signed copy of the 2021 income tax returns and applicable schedules) must be submitted for each parent.***
- Check here if 2021 IRS tax return transcript(s) or a signed copy of the 2021 income tax return and applicable schedules is provided. *Attach it to this document with the student's name and Student ID Number at the top.*
- Check here if 2021 IRS tax return transcript(s) or a signed copy of the 2021 income tax return and applicable schedules 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. Verification of 2021 Income Information for Parents with Unusual Circumstances**

Complete this section if the student's parent(s) has filed or will file a 2021 income tax return with any of the following circumstances.

**Check the box that applies:**

- The parent is required to file a 2021 IRS income tax return and has been **granted a filing extension by the IRS**, must provide.
- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2021.
  - A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021.
  - Verification of Non-Filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2021.
  - A copy of IRS Form W-2 for each source of employment income received for tax year 2021 **and**,
  - If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.
- The parent has **filed an amended IRS income tax return** for tax year 2021, must provide:
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS; **and**
  - A 2021 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) **or** a signed copy of the 2021 IRS Form 1040 and the applicable schedules that were filed with the IRS **or** used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income information.
- The parent was the **victim of IRS tax-related identity theft**, must provide:
- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; **and**
  - A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

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**3. Verification of 2021 Income Information for Parent Nontax Filers**

Complete this section if the student's **parent(s) will not file and not required 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-2/1099 form is provided. List every employer even if they did not issue an IRS W-2 form. *Copies of all 2021 IRS W-2/1099 forms issued to the parent(s) by employer(s) must be provided. Attach the W-2s/1099s and to this document with the student's name and Student ID Number at the top of each one.*

Employer's Name	IRS W-2 or equivalent provided?	Amount earned in 2021
<i>Suzy's Auto Body Shop (example)</i>		<i>\$2,000</i>
		\$
		\$
		\$
		\$
		\$
		\$
<b>Total Amount of Income Earned from Work</b>		\$

**Additionally, the parent(s) must 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.**

- \_\_\_\_\_ Check here if confirmation of non-filing is provided.  
*Attach it to this document with the student's name and Student ID Number at the top.*
  
- \_\_\_\_\_ 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 whose information was reported on the FAFSA 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.***