

2023–2024 INDEPENDENT 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 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 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 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>Marty Jones(example)</i>	<i>28</i>	<i>Wife</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 (or spouse if married) 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 information into the FAFSA. *Your school will use the IRS information that was transferred in the verification process.*
- The student has not yet used the IRS Data Retrieval Tool but will use the tool to transfer 2021 IRS income information into the FAFSA once 2021 IRS tax return have been filed.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **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, 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, 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.

- The student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules must be provided for each.

_____ Check here if a **2021 IRS Tax Return Transcript(s)** or a **signed copy of the 2021 income tax return and applicable schedules** is provided.

_____ Check here if a **2021 IRS Tax Return Transcript(s)** or a **signed copy of the 2021 income tax return and applicable schedules** will be provided later.

- The student and/or spouse filed 2021 Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

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

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

Check the box that applies:

- The student and/or spouse is required to file a 2021 IRS income tax return and **has been granted a filing extension by the IRS** beyond the six-month extension for tax year 2021, 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, 2022 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.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2021 tax account information.

- The student and/or spouse has **filed an amended IRS income tax return** for tax year 2021, must provide:
- IRS DRT information on an ISIR record with all tax information from the original tax return;
 - A signed copy of the 2021 IRS Form 1040 and the applicable schedules that were filed with the IRS; or
 - A 2021 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified.

- The student and/or spouse was the **victim of IRS tax-related identity theft**, must provide:
- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or if unable to obtain an TRDBV. An equivalent document provided by the IRS or a copy of the signed 2021 income tax return and applicable schedules the individual filed with the IRS: **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 Student Nontax Filers

The instructions and certifications below apply to the student (and spouse if the student is married). Complete this section if the student (and 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:

- The student (and spouse if married) was not employed and had no income earned from work in 2021.

- The student (and/or spouse if married) 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-2/1099 form is provided. List every employer even if they did not issue an IRS W-2 form. *Copies of all 2021 W-2/1099 forms issued to you (and spouse if married) by employers 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 attached?	Amount earned in 2021
<i>Suzy's Auto Body Shop (example)</i>	<i>Yes</i>	<i>\$2,000</i>
		\$
		\$
		\$
		\$
		\$
		\$
Total Amount of Income Earned from Work		\$

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. Certification and Signature

I certify that all of the information reported on this worksheet 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, be sentenced to jail, or both.

 Student's Signature

 Date

 Spouse's Signature (if applicable)

 Date

*Do not mail this worksheet to the U.S. Department of Education.
 Submit this worksheet to the financial aid administrator at your school.*