



## 2023–2024 Verification Worksheet - Independent Student

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.

Please carefully read ALL instructions for each section PRIOR to completing each section. All fields marked with an asterisk (\*) are required. Any manual edits to this form must be confirmed with initials and a date next to each edit.

### A. Dependent Student's Information

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\* \_\_\_\_\_ \* \_\_\_\_\_ \* \_\_\_\_\_ \* \_\_\_\_\_  
 Student's Last Name Student's First Name M.I. Social Security Number

\* \_\_\_\_\_ \* \_\_\_\_\_  
 Student's 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

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

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2023, through June 30, 2024, even if a child does not live with the student.
- 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.

Number in College: Include in the space below information about 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, and 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?
Marty Jones (example)	28	Wife	Central University	Yes
		Self	Trinity College of Nursing & Health Science	

**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.**



\*Name: \_\_\_\_\_ SSN: \_\_\_\_\_

**C. Independent Student’s Income Information to Be Verified**

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- 1. TAX RETURN 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.
- 2. Instructions:** Complete this section if the student and spouse filed or will file a 2021 IRS income tax return(s). *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](https://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.

**Check the box that applies (Select ONLY one):**

- The student has used the IRS DRT 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 DRT in *FAFSA on the Web* but will use the tool to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution 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](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "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](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "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.

If 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 are 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.



\*Name: \_\_\_\_\_ SSN: \_\_\_\_\_

**2. TAX RETURN NONFILERS**— Complete this section if the student and spouse will not file and are not required to file a 2021 income tax return with the IRS.

**Check the box that applies (Select ONLY one):**

- The student and spouse were not employed and had no income earned from work in 2021.
- The student and/or spouse were 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.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

<i>Employer’s Name</i>	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021
(Example) ABC’s Auto Body Shop	Yes	\$4,500.00
<i>Total Amount of Income Earned from Work</i>		\$

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 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.

**D. Certification and Signature**

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

Each person signing below certifies that all the information reported is complete and correct.

\_\_\_\_\_

Print Student’s Name

\_\_\_\_\_

Student’s ID Number

\_\_\_\_\_

Student’s Signature (Required)

\_\_\_\_\_

Date

\_\_\_\_\_

Spouse’s Signature (Optional)

\_\_\_\_\_

Date

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