

2023–2024 Verification Worksheet V5 - 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 office at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid office 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

Last 4 Digits of SSN

B. Independent 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. Include children who meet either of these standards, even if they do not live with you. If the child is unborn, include the due date (month and year).
- 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.

NOTE: If you are independent solely because you indicated that you have dependents other than your children who live with you and who do/will receive more than half of their support from you; please review your answers below carefully. Keep in mind that **if you purposely give false or misleading information, you may be fined, sentenced to jail, or both.**

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.

If more space is needed, attach a separate page with your name and Student 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		

C. Independent Student's Income Information to Be Verified

1. Student's Income Information

Instructions: Check only one box below.

- ☐ The student has filed or will file a 2021 IRS tax return. (See instruction section below for required documentation.)
- ☐ The student was not employed and had no income earned from work in 2021. (See instruction section below for required documentation.)
- ☐ The student was employed in 2021 but not required to file a 2021 IRS tax return. Below you must list 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 by employers. List every employer even if they did not issue an IRS W-2 form.

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

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

D. Independent Student's Income Information to Be Verified (Continued)

2. Spouse's Income Information *If you, the student, are unmarried leave spouse information blank.

Instructions: Check only one box below.

- ☐ The student's spouse has filed or will file a 2021 IRS tax return. (See instruction section below for required documentation.)
- ☐ The student's spouse was not employed and had no income earned from work in 2021. (See instruction section below for required documentation.)
- ☐ The student's spouse was employed in 2021 but not required to file a 2021 IRS tax return. Below you must list 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 by employers. List every employer even if they did not issue an IRS W-2 form.

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

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

D. High School Completion Status

As part of the verification process, the U.S. Department of Education has selected you to verify your high school completion status. In order to complete this part of verification, you must provide to your school a copy of one of the following documents:

- Copy of your high school diploma;
 - Copy of your final high school transcript
 - A General Education Development (GED) Certificate
 - Please contact the school's financial aid office for more acceptable documents showing high school completion.
- ☐ By checking this box, I certify that I must provide one of the documents listed above.

E. Statement of Educational Purpose

As part of the verification process, the U.S. Department of Education has selected you to reaffirm your statement of educational purpose. In order to complete this part of verification you must do the following:

- If you are able, appear in person at the school. You will be asked to provide a government issued photo I.D.* and reaffirm your statement of educational purpose. This is the same statement of educational purpose you signed when you completed your FAFSA.
 - If you are not able to appear in person at the school, you will need to contact the school's financial aid office to obtain the statement of educational purpose form. You will need to take this form to a public notary, provide a government issued photo I.D.* and sign the document in their presence. Once completed, you will mail the original signed copy to your school along with a copy of the I.D. used.
 - *Note the government issued I.D. may include a driver's license, other state-issued I.D., or passport. A military I.D. is not acceptable.
- ☐ By checking this box, I certify that I must complete one of the actions listed above.

F. 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, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Spouse's Signature

Date

Submit this worksheet to the financial aid office at your school. - You should make a copy of this worksheet for your records.

Instruction Section for Tax Filers

Option 1 – Use the IRS Data Retrieval Tool

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have already used this tool and submitted your FAFSA with unaltered tax data than no further action is required, unless instructed by your financial aid office.

If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool. If you need more information about when, or how to use the IRS Data Retrieval Tool please contact the financial aid office.

Option 2 – Request an IRS Tax Return Transcript for Filers or Non-Filers

If you do not meet the requirements or choose not to use the IRS Data Retrieval Tool, you are required to submit yours, and your spouse's if married, IRS tax return transcript to the financial aid office. If you are married and you and your spouse filed separate 2020 tax returns, you must submit tax return transcripts for both you and your spouse.

To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link. You can now request and view your tax return transcript instantly online. Be sure to select "Higher Education" to obtain the correct forms. You'll need your SSN, DOB, and the address on file with the IRS (normally this will be the address used when your 2021 IRS tax return was filed), or call 1-800-908-9946

Note: Once you have filed your return with the IRS it may take up to two weeks for IRS income information to be available for electronic tax return filers, and up to eight weeks for paper tax return filers. You must wait until your IRS income information is available before choosing either option.