

2023-2024 DEPENDENT VERIFICATION WORKSHEET (V5)

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 Office of Financial Services at UVF 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 Office of Financial Services at UVF. UVF 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. Dependent 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. Dependent Student's Family Information

List below the people in your parent(s)' household. Include:

- Yourself
- Your parent(s) (including a stepparent) even if you don't live with the parent(s).
- Your parent(s)' other children if the parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024, or 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 the parent(s).
- Other people if they now live with the parent(s) and the parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Include the name of the college for any household member, excluding your parent(s), 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 the student's name and Student ID Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes/No</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.

Student's Name: _____ Alt ID: _____

C. Dependent Student's Income Information to Be Verified**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.

1. Verification of 2021 Income Information for Student Tax Filers**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 in 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 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 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, 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.

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 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.

Student's Name: _____ Alt ID: _____

- The student **has filed an amended IRS income tax return** for tax year 2021, must provide:
- 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; **and**
 - A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

- 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 includes all of 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. If more space is needed, attach a separate page with the student's name and Student ID Number at the top.*

Employer's Name	IRS W-2 or equivalent	Amount earned in 2020
<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, 2021 that indicates a 2021 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 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 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*

Student's Name: _____ Alt ID: _____

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 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 must be submitted for each parent.***

- Check here if a 2021 Federal IRS Tax Return, Puerto Rican, or Foreign Income tax return is provided.
- 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, 2023;
 - 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.

Student's Name: _____ Alt ID: _____

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

Employer's Name	2021 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>
Total Amount of Income Earned from Work		

Additionally, the parent(s) must provide documentation from the IRS or other relevant tax authority dated on or after October 1 2021 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. High School Completion Status

Provide one of the following documents that indicate your high school completion status when the student begins college in 2023–2024:

- A copy of the student's high school diploma showing when graduated.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a state where state law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

Check the box that applies:

- The student has submitted a final official transcript or equivalent to the Admissions Office. *The financial aid administrator will use this information for the verification process.*
- The student has not yet submitted a final official transcript or equivalent. *The student's admissions file or the verification process cannot be completed until a final official transcript or equivalent has been received.*

A student who is unable to obtain the documentation listed above must contact the financial aid office. If we have already received one of the documents above as part of the admission process, you do not need to turn in another copy.

F. Identity and Statement of Educational PurposeTo be signed at the institution:

The student must appear in person at _____ to verify his or her identity

(Name of Postsecondary Educational Institution)

by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

To be signed in the presence of a Notary:

If the student is unable to appear in person at the Institution to verify his or her identity, the student must provide to the Institution:

- A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose
(Print Student's Name)

and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of

attending _____ for 2023-2024.

(Name of Postsecondary Educational Institution)

Student's Signature

Date

Student's ID Number

Authorized Institutional Official's Signature

Date

Notary's Certificate of Acknowledgement

State of _____ City/County of _____

On _____, before me, _____, personally appeared,

(Date)

(Notary's Printed Name)

_____, and provided to me on basis of satisfactory evidence of identification

(Printed Name of Signer)

_____ to be the above-named person who signed the foregoing instrument.

(Type of government-issued photo ID provided)

WITNESS my hand and official seal:

My commission expires on _____

(Notary signature)

(Seal)

(Date)

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 Office of Financial Services at UVF.***

You should make a copy of this worksheet for your records.