

2022-2023 Verification Worksheet V-1

Dependent Student

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. To verify that you provided correct information we 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 us. **Incomplete worksheets will not be processed.** Verification *cannot be completed until all requested documents are received.* **If you have questions about verification, contact our office as soon as possible so that your financial aid will not be delayed.**

Dependent Student's Information

| | | | |
|---|----------------------|----------------|--|
| Student's Last Name | Student's First Name | Student's M.I. | Student's Social Security 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 |

Dependent Student's Family Information

Number of Household Members: List below the **all** of people in the **parents' household**. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2021, through June 30, 2023, or if the other children would be required to provide parental information if they were completing a FAFSA for 2022–2023. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide 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, 2023.

Number in College: Include in the space below information about any household member, excluding the parents, 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, 2022, and June 30, 2023, 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

Student's Name: _____

Dependent Student's Income Information to Be Verified for Tax Filers.

1. **DID YOU FILE A TAX RETURN? YES complete this section and skip #2. NO go to #2.**—**Important Note:** If the student filed, or will file, an amended 2020 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student, filed or will file a 2020 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2020 IRS income tax information into the student's FAFSA.*

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2020 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 2020 IRS income tax return information into the student's FAFSA once the 2020 IRS income tax return has been filed.
- 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 **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules**.

A **2020 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to 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, 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's 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** must be provided for each.
- _____ Check here if a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** is provided.
- _____ Check here if a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** will be provided later.

Dependent Student's Income Information to Be Verified for Nontax Filers.

2. COMPLETE ONLY IF YOU DID NOT FILE A TAX RETURN

The instructions and certifications below apply to the student. Complete this section if the student will not file and is not required to file a 2020 income tax return with the IRS.

Check the box that applies:

- The student is not employed and had no income earned from work in 2020.
- The student was employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. [Provide copies of all 2020 IRS W-2 forms issued to the student 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.

Student's Name: _____

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

Instructions: Complete this section if the parents filed or will file a 2020 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. In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Parent's Income Information to Be Verified for Tax Filers.

1. DID YOU FILE A TAX RETURN? YES complete this section and skip #2. NO go to #2.

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

Instructions: Complete this section if the parents filed or will file a 2020 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.* In most cases, no further documentation is needed to verify 2020 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:

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student's FAFSA once the 2020 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules.**

A **2020 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to 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, 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 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules must be provided for each.**

- Check here if a 2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules is provided.**
- Check here if a 2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules will be provided later.**

Student's Name: _____

Parent's Income Information to Be Verified for Nontax Filers.

2. COMPLETE ONLY IF YOU DID NOT FILE A TAX RETURN

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2020 income tax return with the IRS.

Check the box that applies:

Neither parent was employed, and neither had income earned from work in 2020.

One or both parents were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. [Provide copies of all 2020 IRS W-2 forms issued to the parents 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.

| Employer's Name | Annual Amount Earned in 2020 | IRS W-2 Provided? |
|---|------------------------------|-------------------|
| ABC's Auto Body Shop (example) | \$4,500.00 | Yes |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | \$ | |

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2020 IRS income tax return was not filed with the IRS or other relevant tax authority.

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

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 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.

Print Student's Name

Student's ID Number

Student's Signature (can't be typed)

Date

Parent's Signature (can't be typed)

Date

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

Student Financial Services
William Woods University
1 University Ave
Fulton, MO 65251
573-592-1180 Fax

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