

# 2023–2024 Verification (V5) 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, Student Financial Services 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 Student Financial Services at your school. Your school may ask for additional information. If you have questions about verification, contact Student Financial Services as soon as possible so that your financial aid will not be delayed.

### A. INDEPENDENT STUDENT'S INFORMATION

//For Office Use Only// Academic Division:

Verified ☐

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 E-mail Address

Student's Home Phone Number

Student's Alternate or Cell Phone

Student ID Number

### B. INDEPENDENT STUDENT'S FAMILY INFORMATION

In the grid below, list the people in the student's household. Include:

- **Yourself**
- **Your spouse** if you are married/remarried
- **Your children and your spouse's children**, if the student or spouse will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the child would be required to provide your 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 you.
- **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.
- **Number in college** Include in the space below information for 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. *Include the name of the college.*

\*\*\*PLEASE LIST ALL OF YOUR HOUSEHOLD MEMBERS BELOW\*\*\*

*if more space is needed, attach a separate page with the student's name and student ID at the top.*

Full Name ( <u>ALL</u> household members)	Age	Relationship	Name of College attending between 07/01/2023- 06/30/2024	Will be Enrolled at Least Half-Time in College? (Y or N)
		Self (Student)	Cedar Crest College	<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

**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.

### C. INDEPENDENT STUDENT'S INCOME INFORMATION TO BE VERIFIED

**IMPORTANT NOTES:** If the student and/or spouse filed, or will file, an amended 2021 IRS tax return, the student must contact Student Financial Services before completing this section. The instructions below apply to the student and spouse, if the student is married. Notify Student Financial Services 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. TAX RETURN FILERS INSTRUCTIONS:** Complete this section if the student and/or spouse, if married, 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.* 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 if you filed or will file a 2021 Tax Return:**

- ☐ 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's school will use the IRS information that was transferred in the verification process.*
- ☐ The student has not yet used the IRS DRT in *FAFSA on the Web* and will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the 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 Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to [www.irs.gov](http://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](http://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.*

- ☐ Check here if the student's **2021 IRS Tax Return Transcript(s) OR a signed copy of the 2021 income tax return and applicable schedules** is attached to the verification worksheet.
- ☐ Check here if the student's **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 has been submitted to the student's school.*

- 2. NON TAX FILERS INSTRUCTIONS** - 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 form is attached. **Attach copies of all 2021 IRS W-2 forms issued to the student 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 the student's name and Social Security Number at the top. NOTE: We may require you to provide documentation from the IRS that indicates a 2021 IRS income tax return was not filed with the IRS.*

Student (or Spouse) Employer's Name	2021 Amount Earned	IRS W-2 Attached?
(EXAMPLE) Suzy's Auto Body Shop	\$2,000.00	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Student's Name: \_\_\_\_\_ SSN or Student ID: \_\_\_\_\_

**D. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (To Be Signed At The Institution)**

The student must appear in person at \_\_\_\_\_ to verify  
(Name of Postsecondary Educational Institution)

his or her identity by presenting a 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 with the date it was received and the name of the official at the institution authorized to collect the student's ID.

**In addition, the student must sign, in the presence of the institutional official, the following:**

**Statement of Educational Purpose**

I certify that I, \_\_\_\_\_, am the individual signing this Statement of  
(Print Student's Name)

Educational Purpose 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

\_\_\_\_\_  
Student ID

\_\_\_\_\_  
Date

**E. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (To Be Signed With Notary)**

If the student is unable to appear in person at \_\_\_\_\_ to  
(Name of Postsecondary Educational Institution)

verify his or her identity, the student must provide:

(a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport;

**and**

(b) The original notarized Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I, \_\_\_\_\_, am the individual signing this Statement of  
(Print Student's Name)

Educational Purpose 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

\_\_\_\_\_  
Student ID

\_\_\_\_\_  
Date

Student's Name: \_\_\_\_\_ SSN or Student ID: \_\_\_\_\_

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

on \_\_\_\_\_, before me, \_\_\_\_\_,

(Date)

(Notary's name)

personally appeared, \_\_\_\_\_, and provided to me

(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_

(Type of government-issued photo ID provided)

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

**WITNESS my hand and official seal**

(seal)

\_\_\_\_\_

(Notary signature)

My commission expires on \_\_\_\_\_

(Date)

**F. Certification and Signature(s)**

I certify that all the information reported on this worksheet is complete and correct.

The student must sign and date the worksheet.

If married, 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

\_\_\_\_\_  
Date

**Do not mail this worksheet to the U.S. Department of Education.  
Submit this worksheet to Student Financial Services at your school.**

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