

2023-2024 V5 Independent Verification

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called Verification. The U.S. Department of Education regulations require that before awarding Federal Student Aid, the Financial Aid Office must ask you to confirm information that you and, if married, your spouse reported on your 2023-2024 FAFSA.

It is requested that all Verification documentation be turned in without delay upon receiving a Verification notice. Failure or delay in the completion of the Verification process could jeopardize 2023- 2024 financial aid awards.

All documentation provided must include student's name, Student ID and original signature and date. Digital/e-signatures will not be accepted on any forms in the Verification process.

Instructions for Tax-Filers:

To obtain an IRS tax return transcript, you can go to www.IRS.gov and click on "Get My Tax Record" and then click on "Get Your Tax Record." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." Or you can call 1-800-908-9946. **A signed copy of the 2021 income tax return and applicable schedules may also be accepted.**

You may also request to receive your transcript by mail by clicking "Get Transcript by Mail" or by submitting the 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.

Please note that if you are eligible to use the IRS Data Retrieval Tool to link your taxes to the FAFSA, this option may limit any current and future request for verification and may result in a quicker resolution of your verification status.

Instructions for Non Tax-Filers:

If you are married, confirmation of filing will be needed for both you and your spouse. If one of you filed and the other did not, we will need a transcript or signed copy of the tax return for one and a confirmation of non-filing for the other. If both of you did not file, we will need a confirmation of non-filing for both.

You will need to provide the following:

- A VERIFICATION OF UNUSUAL TAX CIRCUMSTANCES FORM (available on the college website under Forms tab)
- A listing of the sources of any income earned by the individual from work and the amount of income from each source; **AND**
- A copy of IRS Form W-2, or an equivalent document, for all sources of employment income received by the individual.
- Obtain a Verification of Non-Filing (VNF) Letter by going to www.IRS.gov and clicking "Get My Tax Record," then request a transcript online or by mail. You can also call 1-800-908-9946. If the IRS has no record of a 2021 tax return for you, you will receive a letter confirmation your non-filing.

If the individual is unable to obtain VNF from the IRS or other tax authorities and, contact the Financial Aid office and provide a signed statement certifying that the individual attempted to obtain the VNF from the IRS or other tax authorities and was unable to obtain the required documentation. Upon approval the Financial Aid staff will determine, your good-faith effort to obtain the required documentation and the college will accept—

- *A signed statement certifying the individual has not filed and is not required to file an income tax return.*

2023-2024 Independent Household Information Worksheet

Student Last Student First Middle Initial Student ID School

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 people’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, 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, attach a separate page with your name and Student ID at the top)

***NO FIELD SHOULD BE LEFT BLANK FOR ANY MEMBER OF HOUSEHOLD. IF LEFT BLANK, NEW FORM WILL BE REQUESTED.**

Full Name	Age	Relationship to student	College	Will be enrolled at least half time
<i>Marty Jones (example)</i>	<i>28</i>	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		Self		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible institutions is inaccurate.

CERTIFICATION AND SIGNATURE

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

Student Signature (Required)

Date (Required MM/DD/YYYY)

Spouse Signature (Optional)

Date (Required MM/DD/YYYY)

2023-2024 Independent Filing Status Worksheet

(PLEASE CHECK ONE AND FOLLOW ALL INSTRUCTIONS)

Student Last

Student First

Middle Initial

Student ID

School

2021 Non-Filers

I (and my spouse, if married) did not (and was not required to) file taxes in 2021 – neither of us had any income earned from work (***in addition to checking this box, you and your spouse, if married must submit confirmation of non-filing for the 2021 tax year from the IRS or a relevant tax authority***)

I (and my spouse, if married) did not (and were not required to) file taxes in 2021; however, I (and/or my spouse) was employed. Please complete information below and provide copies of all 2021 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2021 IRS W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W2 is unavailable (***in addition to checking this box, you and your spouse, if married, must submit confirmation of non-filing for the 2021 tax year from the IRS or a relevant tax authority***)

Employer's Name	2021 Amount Earned	Employee's name (student/spouse)	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00	Student	Yes

2021 Federal Income Tax Filers

I (and my spouse, if married) filed taxes in 2021 (and)

I have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2021 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)

I am unable to use the IRS Data Retrieval Tool, and I will submit copies of my 2021 Federal Tax Return Transcript (OR a signed copy of the tax return form) to my school.

(Married students only) I and my spouse filed separately in 2021 and I will submit copies of our 2021 Federal Tax Return Transcripts, or signed tax return forms.

(Married students only) I and my spouse filed jointly in 2021, but we are now separated. I will provide a copy of our 2021 Federal Tax Return Transcript or signed tax return form, along with all of my 2021 W-2s.

Special Circumstance:

Check here if for the 2021 tax year, you - and/or your spouse-were granted a filing extension, filed an amended tax form, were a victim of identity theft, or if you filed a non-IRS Income tax return. (***If you check this box, we must have a completed "Verification of Unusual Tax Circumstances" form***)

CERTIFICATION AND SIGNATURE

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

WARNING: If you purposefully give false or misleading information you may be fined, be sentenced to jail, or both.

Student Signature (Required)

Date (Required MM/DD/YYYY)

Spouse Signature (Optional)

Date (Required MM/DD/YYYY)

2023-2024 Statement of Educational Purpose (Instructions)

(From Appendix A of the IFAP Electronic Announcement Posted September 25, 2021)

Instructions for Postsecondary Institutions

Students should appear in person at the school and present a valid and unexpired, government-issued photo identification (ID) such as a passport or a driver's license or other state-issued ID. You must maintain an annotated copy of that ID that includes the date it was received and the name of the person your school authorized to receive it.

Students must also sign a statement of educational purpose that certifies who they are and that the federal student aid they may receive will only be used for educational purposes and for the cost of attending the school for the 2023-2024 year.

A student who is unable to appear at the school must sign and submit the statement of educational purpose and he must submit a copy of his ID with the statement signed by a notary public confirming that the student appeared before her and presented the ID confirming his identity.

Please send the annotated copy of the ID along with this form to the OFA, so that we may complete verification.

Instructions for Notary Public

The acceptable forms of ID are indicated in the "Verification By School Official" section of the second page of this document (the "2023-2024 Statement of Educational Purpose").

