

Student Name _____

C. Dependent Student’s Income Information to be Verified

1. TAX RETURN 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 IRS income tax return information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed. In most cases, for electronic filers, 2021 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2021 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the 2021 IRS income tax return information is available for the IRS DRT within 8–11 weeks after the 2021 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

Check the box that applies:

- The student has used a tax return 2021 of Puerto Rico, a U.S. Territory or freely Associated State.
- 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 once the 2021 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 school a **2021 IRS Tax Return Transcript(s)**. (signature not required)

To obtain a **2021 IRS Tax Return Transcript**, go to www.irs.gov and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946. Make sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript.” Use the Social Security Number and date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return). In most cases, for electronic filers, a **2021 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2021 IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the **2021 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2021 paper IRS income tax return has been received by the IRS.

_____ Check here if a **2021 IRS Tax Return Transcript(s)** is provided.

2. TAX RETURN NONFILERS - The instructions and certifications below apply to the student, 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 employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 IRS W-2 forms issued to the student and spouse 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	2021 Amount Earned	IRS W-2 Provided?
<i>(Example) Suzy’s Auto Body Shop</i>	<i>\$4,500.00</i>	<i>Yes</i>
Total Amount of Income Earned From Work	\$	

Student Name _____

D. Parent’s income Information to be Verified

1. TAX RETURN FILERS -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 2021 or had a change in marital status after the end of the 2021 tax year on December 31, 2024.

Instructions: Complete this section if the parents 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 2020 IRS income tax return 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 a tax return 2021 of Puerto Rico, a U.S. Territory or freely Associated State
- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2021 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 2021 IRS income tax return information into the student’s FAFSA once the 2021 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 **2021 IRS Tax Return Transcript(s)**. (signature not required)

To obtain a **2021 IRS Tax Return Transcript**, go to www.irs.gov and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946. Make sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript.” Use the Social Security Number and date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return). In most cases, for electronic filers, a **2021 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2021 IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the **2021 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2021 paper IRS income tax return has been received by the IRS.

If the parents filed separate 2021 IRS income tax returns, **2021 IRS Tax Return Transcripts** must be provided for both.
____ Check here if a **2021 IRS Tax Return Transcript(s)** is provided.

2. TAX RETURN NONFILERS - The instructions and certifications below apply to each parent included in the household, if the parents will not file and are 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.
- One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 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	2021 Amount Earned	IRS W-2 Provided?
<i>(Example) Suzy’s Auto Body Shop</i>	<i>\$4,500.00</i>	<i>Yes</i>
Total Amount of Income Earned From Work	\$	

E. Certifications and Signatures

Each person signing below certifies that all of the information reported 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 you may be fined, be sentenced to jail, or both.

Student’s Signature

Date

Parent’s Signature

Date

2023–2024 Verification Worksheet Identity and Statement of Educational Purpose

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
(Print Student's Name)
Statement of 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)

F. Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct.
The student information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

(Student's Signature)

(Date)

(Student's ID Number)