



XAVIER UNIVERSITY OF LOUISIANA
OFFICE OF STUDENT FINANCIAL AID

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2023—2024 Independent Verification Worksheet

Your application was selected for a review process called “Verification.” In this process, the university will be comparing information from your application with copies of your (*and your spouse’s, if you are married*) 2021 Federal Income Tax Transcript, W-2 form(s), and any other financial documents. The law says we have the right to ask you for this information before awarding Federal Aid. If there are differences between your application information and your financial documents, you or the university may need to make corrections electronically by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won’t be delayed. Your financial aid administrator will assist you.

What you should do:

1. Collect you and your spouse’s (*if married*) financial documents (Federal Income Tax Transcript, W-2 forms, 1099s, and etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete **and** sign the worksheet(s)- you and your spouse (*if married*).
4. Submit the completed worksheet, tax forms, and any other documents your school requests of you to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically by using your SAR.

A. Student Information

Last Name	First Name	M.I.	XXX-XX-
			Last Four Numbers of Social Security Number
Address (include Apt. No.)			Date of Birth
City	State	ZIP Code	Telephone Number (including Area Code)
Student’s XU Email @xula.edu			Student’s XU Number

B. Family Information

List the people in your household, including:

- Yourself, and your spouse (*if married*), and
- Your children, if you will provide **more than half of their support** from **July 1, 2023** through **June 30, 2024**, and
- 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** from **July 1, 2023** through **June 30, 2024**. ***Note: If you listed a nontraditional person in the household, additional documentation will be required.**

Write the names of all household members in the space(s) below who you and your spouse (if applicable), **provide more than 50% of their support**. Also include the name of the college of 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 20, 2024. *Use a separate page, if needed. Please monitor your XULA email for any correspondences.*

Full Name	Age	Provide more than 50% of support?	Relationship	College
Missy Jones (example)	24	No	Sister	Central University

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: US Department of Education, Washington, DC 20212-5345

C. Student and/or Spouse's Income Information to Be Verified: If you or your spouse (*if married*), **filed or will file a 2021 income tax return with the IRS**, the best way to verify income is by using the **IRS Data Retrieval Tool** within FAFSA on the Web. If you have not already used the tool, go to www.fafsa.ed.gov, log into your FAFSA record, select “**Make FAFSA Corrections**,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool (DRT) and transfer your 2021 IRS income tax information into your FAFSA. You must report that your tax return is complete for the system to present the IRS DRT option.

1. STUDENT AND/OR SPOUSE TAXFILERS:

Instructions: Complete this section if you, the student, and/or spouse **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 www.fafsa.ed.gov.*

Check the box below that applies:

- I, the student, **have used the IRS DRT** in FAFSA on the Web to transfer 2021 IRS income tax return information into my FAFSA.
- I, the student, **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 my FAFSA on or before _____. Please provide as soon as possible to prevent a delay in determining your financial aid.
- I, the student, am **unable or choose not to use** the IRS DRT in FAFSA on the Web, and instead will provide the school with a **2021 IRS Tax Return Transcript on or before** _____.
- Since I did not use the IRS DRT, I must also submit form W-2s, 1099s and proof of all earned income. I have included all of the required documents for review. ____ Yes *Note: Failure to submit these documents will delay processing of your file.*

If the student and spouse filed **separate** 2021 IRS income tax returns, the IRS DRT **cannot** be used and the 2021 IRS Tax Return Transcript(s) must be provided for each.

_____ Check here if a 2021 IRS Tax Return Transcript is provided.

_____ Check here if a 2021 IRS Tax Return Transcript will be provided later.

Note: IRS Forms 1040, 1040A, 1040EX are not the same as an IRS Tax Return Transcript. A 2021 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 “**IRS Tax Return Transcript**” and **NOT** the “**IRS Tax Account Transcript**.”
- **Get Transcript Online** – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript Online.” Make sure to request the “**IRS tax Return Transcript**” and **NOT** the “**IRS Tax Account Transcript**.”
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.

2. STUDENT AND/OR SPOUSE: NON TAX FILERS: Complete this section if you, the student (and if married, your spouse), will not file and **are not required** to file a **2021 Income Tax Return** accordance with the IRS regulations at www.irs.gov.

Check the box that applies:

- I, the student, and/or spouse was/were not employed and had **no income** earned from work in 2021. *Please contact the financial aid office.*
- I, the student, and/or spouse was/were employed in 2021 **and** have listed below the names of all employers, the amount earned from each employer in 2021 and attached all 2021 IRS W-2s, 1099s and or equivalent document. List every employer even if the employer did not issue an IRS W-2 form.) Failure to submit the proof of income will delay processing of your file.

For either of the scenarios above, you must submit an **IRS Verification of Nonfiling Statement**. Provide IRS Verification of Non-filing from the IRS or other relevant tax authority dated on October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority. This document can be obtained directly from the IRS by sending form 4506T to the IRS or by contacting the IRS directly.

_____ Check here if IRS Verification of Non-filing is provided.

_____ Check here if IRS Verification of Non-filing will be provided later on or before _____.

Employer’s Name	IRS W-2 Provided?	Annual Amount Earned in 2021
(<i>Example</i>) ABC’s Auto Body Shop	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

If more space is needed, provide a separate page with the student’s name and XULA ID number at the top.

D. Filing Extension Granted: If you were granted a filing extension by the IRS, please obtain 2021 **Filing Extension Form** from our website at <http://www.xula.edu/formsandresources> and follow the instructions provided.

E. Amended Filers (Student and/or Spouse):

Check here if an **AMENDED** IRS Income Tax return has been filed by: Student Spouse

If an **Amended** IRS income tax return for tax year 2021 has been filed, please submit the following:

- A. If the IRS Data Retrieval Tool has **NOT** been used, a **2021 IRS Tax Return Transcript** or,
- B. 2021 IRS Tax Account Transcript; **and** a signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

E. Identity Theft Filers (Student and/or Spouse):

Check here if you were a victim of IRS tax-related identity theft. If so, please submit the following:

- A. A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that include all of the income and tax information required to be verified; **and**
- B. 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.

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

Each person signing below certifies that all of the information reported is complete and correct. The student must sign and date this worksheet. If married, the spouse's signature is optional.

Student's Signature

Date

Spouse's Signature

Date

Don't forget to sign your form!

Note: Upon review of your account, should additional documents/clarification be needed, you will receive a correspondence to your XULA email.