



2023—2024 Dependent 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 parent(s)’ 2021 Federal Income Tax Transcript, and with 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 parent(s)’ 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 at least one parent.
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

_____	_____	_____	XXX-XX-_____
Last Name	First Name	M.I.	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			Student’s XU Number

B. Family Information

List the people in your parent’s household, including:

- Yourself, and your parent(s) (including stepparent) even if you don’t live with your parent(s), and
 - Your parents’ other children, even if they don’t live with your parent(s), if **a) your parents will provide more than half of their support from July 1, 2023 through June 30, 2024 or b) the children would be required to provide parental information when applying for Federal Student Aid, and**
 - Other people if they now live with your parents, and your parents 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: Do not include them if your parents will not provide more than half of their support).**
- *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. Also include in the “college” 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 20202-5345

C. Student Income Information to Be Verified: If you **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 TAX FILERS:

Instructions: Complete this section if you, 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 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 _____.
- 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 _____. Please provide as soon as possible to prevent a delay in determining your financial aid.
 _____ Check here if 2021 IRS Tax Return Transcript is provided.
 _____ Check here if 2021 IRS Tax Return Transcript will be provided later.
- Since I did not use the IRS DRT, I must also submit form W-2s, 1099s and proof of all earned income during 2021. I have included all of the required documents for review. Yes**
Note: Failure to submit these documents will delay processing of your file.

Note: 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** – Call 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.

2. STUDENT NONTAX FILERS: Complete this section if you, the student, will not file and are not required to file a **2021 Income Tax Return** in accordance with the IRS regulations at www.irs.gov.

Check the box that applies:

- I, the student, was not employed and had no income earned from work in 2021.
- I, the student, was employed in 2021, but was not required to file taxes in accordance with the IRS regulations at www.irs.gov. List below the names of all employers and the amount earned from each employer in 2021. Also, provide copies of **all** 2021 IRS W-2s, 1099s, and any other forms as proof of earned income. List every employer even if the employer did not issue an IRS W-2 form.
I have included all of the required documents for review. ___ Yes

Note: Failure to submit these documents will delay processing of your file.

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

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

Dependent

D. Parent Income Information to Be Verified: If you **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 <https://studentaid.gov/h/apply-for-aid/fafsa>, 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. PARENT TAX FILERS:

Instructions: Complete this section if you, the parent(s), **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 <https://studentaid.gov/h/apply-for-aid/fafsa>. **Note:** *If the parents filed a separate 2021 IRS income tax return, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript must be provided for each parent.*

Check the box below that applies:

- I/We, the parent(s), **has/have used the IRS DRT** in FAFSA on the Web to transfer 2021 IRS income tax return information into the FAFSA.
- I/We, the parent(s), **has/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 FAFSA on or before _____.
- I/We, the parent(s), **am/are 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 _____. Please provide as soon as possible to prevent a delay in determining the student’s financial aid.
- Since I did not use the IRS DRT, I must also submit copies of **all** 2021 IRS W-2s, 1099s, and proof of all earned income during 2021. **I have included all of the required documents for review.** ___ Yes
Note: Failure to submit these documents will delay processing of your file.

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

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

Note: 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. PARENT(S) NONTAX FILERS: Complete this section if you, the parent(s) **will not file** and **are not required to file** a 2021 Income Tax Return in accordance with the IRS regulations at www.irs.gov. The federal regulations state you must obtain an IRS Verification of Nonfiling Confirmation Letter dated on or after October 1, 2021 from the IRS by requesting on-line or by telephone.

Check the box that applies:

- I/We, the parent(s), was/were not employed and had no income earned from work in 2021.
- I/We, the parent(s), was/were employed in 2021, but was not required to file taxes in accordance with the IRS regulations at www.irs.gov. **You must obtain and submit an IRS Verification of Nonfiling Statement directly from the IRS.**

_____ Check here if IRS Verification of Nonfiling Confirmation Letter is provided.

_____ Check here if IRS Verification of Nonfiling Confirmation Letter will be provided.

- List below the names of all employers, the amount earned from each employer in 2021. Also, provide copies of **all** 2021 IRS W-2s, 1099s, and any other forms as proof of earned income. List every employer even if the employer did not issue an IRS W-2 form. **I have included all of the required documents for review. Yes**

Note: Failure to submit these documents will delay processing of your file.

E. Filing Extension Granted: If you and/or parent(s) were granted a filing extension by the IRS, you and/or parent(s) must obtain and complete the 2021 **Filing Extension Form** from our website at <https://www.xula.edu/formsandresources> and follow the instructions provided.

E. Amended Filers (Student and/or Parent)

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

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.

G. Identity Theft Filers (Student and/or Parent)

- Check here if you were a victim of IRS tax-related identity theft. If so, please submit the following:
- A. A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes 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.

H. 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 and at least one parent must sign and date this worksheet.

Student’s Signature

Date

Parent’s Signature

Date