

2023-24 VERIFICATION WORKSHEET (INDEPENDENT STUDENT)

Your financial aid application was selected for review in a process called "Verification." In this process, we will compare information from your FAFSA with information from this document. To qualify for financial aid, all information should be received before the end of the term for which you want aid.

Student Information

Last Name	First Name	Permanent Address	
Student ID#	City	State	ZIP Code
Phone Number (include area code)		Email Address	

Household Information

List *yourself* below:

Full Name: _____ Age: _____

List your spouse below, if you have one. Do not include spouse if you are divorced, separated or widowed. Write in the name of the college if your spouse will be attending college at least half-time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree or certificate program.

Full Name: _____ Age: _____

College Spouse is Attending: _____

List your children below if you provide more than half of their support from July 1, 2023 through June 30, 2024. :

- Include other people **only** if they now live with you and receive more than half of their support from you, **AND** will continue to get this support from July 1, 2023 through June 30, 2024.
- Write in the name of the college for those who will be attending college at least half-time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree or certificate program.

Full Name	Age	Relationship to Student	Name of College, If Attending
<i>Example:</i> John Smith	13	Son	Not Attending College

If you need more space, attach a separate page (Please include your Student ID Number).

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Student Income Information From 2021

 Check *ONE* box:

- I will not file a 2021 federal income tax return because I did not work in 2021 and I had \$0 income.
 (No additional documentation required)

- I will not file and am not required to file a 2021 federal income tax return, but I did work in 2021.

Documentation Required:

- W-2(s) from each 2021 employer, and/or
- Signed statement of income if self-employed
- Complete the table below. **Do not leave blanks.**

Name of Employers or Sources of Income	Total Received in 2021
	\$
	\$
	\$

- I filed a 2021 federal income tax return and will use the IRS Data Retrieval Tool (recommended method) to transfer my unaltered tax information from IRS to my FAFSA and submit the FAFSA correction. If taxes recently filed, wait 2 weeks (if electronically filed) or 8 weeks (if mailed) before using the tool. See Instructions for IRS Data Retrieval.

- I filed a 2021 federal income tax return, but I am unable to use the IRS Data Retrieval Tool and will submit the 2021 tax information as indicated below. *Check one of the following:*

____ I am submitting a 2021 Tax Return Transcript.

See Instructions for Tax Transcript Request from IRS.

____ I filed a 2021 amended tax return – submit the following:

- 2021 Federal Tax Return Transcript
- Signed copy of your IRS Form 1040X that was filed with the IRS.

____ I filed a Puerto Rican or foreign tax return – submit the following:

- A copy of the 2021 tax return.

____ I was the victim of IRS Identity Theft/Fraud.

- Contact the IRS’s Identity Protection Specialized Unit (IPSU) at (800)908-4490
- Request an alternate paper tax return transcript known as the Transcript Data Base View (TRDBV) from a Taxpayer Assistance Center
- Submit a copy of the TRDBV to the Financial Aid Office, **and**
- A signed statement that the filer was a victim of IRS tax related identity theft and that the IRS has been made aware of the tax-related identity theft.

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Spouse Income Information From 2021

 Check *ONE* box:

- I am not married.
- I filed jointly with my spouse.
- My spouse is not required to file a 2021 federal income tax return because they did not work in 2021, had \$0 income.
 - IRS Verification Non-filing letter dated on or after October 1, 2022
- My spouse will not file and is not required to file a 2021 federal income tax return, but worked in 2021.

Documentation Required:

- W-2(s) from each 2021 employer, and/or
- Signed statement of income if self-employed
- IRS Verification of Non-filing letter dated on or after October 1, 2022
- Complete the table below. **Do not leave blanks.**

Name of Employers or Sources of Income	Total Received in 2021
	\$
	\$
	\$

- My spouse filed a separate return and will submit the 2021 tax information indicated below. Check one of the following:
 - _____ My spouse is submitted a separate 2021 Tax Return Transcript. See Instructions for Tax Transcript Request from IRS.
 - _____ My spouse filed an amended 2021 tax return – submit the following:
 - 2021 IRS Tax Return Transcript
 - Signed copy of 2021 1040X (amended return) which was filed with the IRS
 - _____ My spouse filed a Puerto Rican or foreign 2021 tax return – submit the following:
 - A signed copy of the tax return.
 - _____ My spouse was the victim of IRS identity theft/fraud
 - Contact the IRS’s Identity Protection Specialized Unit (IPSU) at (800)908-4490
 - Request an alternate paper tax return transcript known as the Transcript Data Base View (TRDBV) from a Taxpayer Assistance Center
 - Submit a copy of the TRDBV to the Student Financial Services, **and**
 - A signed statement that the filer was a victim of IRS tax related identity theft and that the IRS has been made aware of the tax-related identity theft.

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By signing this worksheet, we certify that all the information reported to qualify for Federal student aid is complete and correct. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student Signature

Date

Frank Phillips College does not discriminate on the basis of age, race, religion, color, national origin, sex or handicap in its programs, services or activities as required by Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Education Amendments of 1972; and Section 504 of the Rehabilitation Act of 1973, as amended.

Frank Phillips College no discrimina por motivos de raza, edad, religión, color, origen nacional, sexo o impedimento en sus programas, servicios o actividades según requerido por el Título VI de la Ley de Derechos Civiles de 1964, según enmienda; el Título IX de las Enmiendas de Educación de 1972; y la Sección 504 de la Ley de Rehabilitación de 1973, según enmienda.

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IRS Data Retrieval:

The recommended way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, complete the following:

- Go to www.FAFSA.gov,
- Log in to the student's FAFSA,
- From the top of the page, click "Enter Section" on Section 6, "Student Financials"
- Follow the instructions to determine if the student and/or parent is eligible to use the IRS Data Retrieval Tool to transfer IRS income tax information into the student's FAFSA.
- Make sure you also submit the FAFSA for correction after determining/transferring the tax information from the IRS.

Tax Transcript & Letter of Non-filing Request from IRS:

If you or spouse (if applicable) is unable to use the Data Retrieval Tool, use the instructions below to request your IRS tax return transcript. If you or your spouse (if applicable) did not file a tax return and are required to submit a letter of non-filing follow the instructions below. .

IRS - Get Transcript
<ul style="list-style-type: none"> • www.irs.gov/transcript • IRS's preferred Transcript delivery channel • Accessible after taxpayer authenticates identification • Do not proceed as 'guest' • Select appropriate tax year - * beside year means not available yet • Provides IMMEDIATE display of transcript via PDF file • User can view, print, and/or save the file

Tax Return Transcript			Letter of non-filing
Automated Phone	Mail	Form 4506T-EZ	Form 4506T
<ul style="list-style-type: none"> • 1(800)908-9946 • Self-service • 5-10 day delivery to address on file 	<ul style="list-style-type: none"> • www.irs.gov/transcript • Select "Get Transcript by Mail" • 7-10 day delivery to address on file 	<ul style="list-style-type: none"> • http://www.irs.gov/pub/irs-pdf/f4506tez.pdf • Send to address or fax # on page 2 • 10-20 day delivery to specified address • Will be delivered to home address from tax return 	<ul style="list-style-type: none"> • https://www.irs.gov/pub/irs-pdf/f4506t.pdf • Select #7 "Verification of Non-filing" • Send to address or fax # on page 2 • 10-20 day delivery to specific address • Will be delivered to home address from tax return