



2023-2024 Verification Worksheet - Independent Student FAQ's

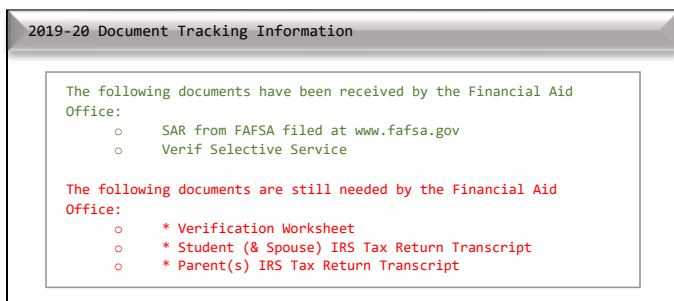
Your 2023-2024 FAFSA was selected for verification, a process in which the financial aid office must obtain documentation to ensure accuracy of the information submitted on the FAFSA. Information provided on the FAFSA will be compared with required documents (2021 IRS Tax Returns, W2s, etc.). If there are differences, your FAFSA information may need to be electronically corrected.

Why was I selected for Verification?

The main reasons for being selected for verification include that you were chosen randomly, the FAFSA you submitted was incomplete, your FAFSA contains estimated information, or the data you provided on the FAFSA is inconsistent. Verification is a federal regulation. Students who are selected for verification are not being punished; rather, verification prevents ineligible students from receiving aid by reporting inaccurate information and ensures that eligible students receive all of the aid for which they are qualified.

What documents should be submitted?

You will be notified via email by the Financial Aid office. You can also check through your Campus Connect by selecting *Acct Info, Review Financial Aid*, and choosing the **22-23 year**. The Document Tracking Information will list out documents needed, including those related to verification.



What happens if I do not complete verification?

Students who do not complete verification during the 2023-24 year cannot receive state, federal and some institutional financial aid for the entire 2023-24 year. Students can still attend class without completing verification, but those students must find an alternative method of payment for school besides financial aid. Students must complete verification by June 15, 2023. However, delays in submitting documents could result in ineligibility due to timing of file receipt and/or completion and late penalties may be applied to your student account if you fail to make satisfactory payment arrangements with the Business Office.

What is the IRS Data Retrieval Tool (DRT) and how do I use it?

The IRS Data Retrieval Tool (DRT) allows students and their spouse to access IRS tax return information and transfer it directly into their FAFSA. You are ineligible to use the DRT if you are married but filed separately or if your marital status has changed as of January 1. We highly recommend using this tool as you won't need to provide a copy of your or your spouse's Tax Return or Tax Transcript if selected for verification.

What if I or my spouse applied for a tax extension?

If you and/or your spouse have requested an extension to file, you must submit the following to continue with your verification:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2021;
- Verification of Non-filing Letter (confirmation that the tax return has not been filed) from the IRS or a Signed statement indicating you tried to get a Verification of Non-Filing Letter and statement that you have not filed.
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021;
- A copy of IRS W-2 Form for each source of employment income received for tax year 2021. If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.

How do I request a copy of my Tax Transcript or Verification of Non-filing?

IRS Tax Returns and IRS Tax Transcripts can be requested one of several ways: (1) **Online** through <http://www.irs.gov>. Under the "Tools" section, select "Get a Tax Transcript." (2) **By mailing** in Form 4506-T to the IRS. For a Verification of Non-filing you must use Form 4506-T and check box 7. (3) **By calling** 1-800-908-9946. (4) **In person**, at your local IRS office. Generally, you will need to make an appointment to go in person.

Can I submit my Tax Return instead of Tax Transcript?

Yes, we can now receive a signed 2021 1040 (including schedules 1, 2, and 3 if applicable) instead of tax return transcripts from the IRS. Also, if you did not file and you are not able to get a Verification on Non-filing letter you can submit a signed statement indicating you tried to get a verification of non-filing letter and that you have not filed taxes.

What if I (or my spouse) was a victim or tax-related identity theft?

Obtain a TRDBV Transcript by contacting the *IRS Identity Protection Specialized Unit* at (1-800-908-4490).

What Happens after I submit the documents to Financial Aid

If necessary, we may request additional information and/or documentation to resolve any discrepancies that arise during the processing of your paperwork. In the event we must contact you, please respond to these requests as quickly as possible, as failure to do so will only further delay disbursement of your financial aid. Once all documents are submitted for processing, turnaround time is within 7-10 business days. If necessary, a follow up email will be sent once verification is complete explaining any changes in EFC and/or awarding.



2023-2024 Independent Student Verification Worksheet

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected.

You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Student's Information				
Student's Last Name	First Name	M.I.	Student ID Number	
Street Address (include apt. no.)			Date of Birth	
City	State	Zip Code	Email Address	
Cell Phone (include area code)			Alternate Phone Number	

B. Household Members & Number in College

Household Includes:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2023, through June 30, 2024, even if they do not live with you.
- 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 through June 30, 2024.

Number in College Includes:

The name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023, and June 30, 2024. If more space is needed, attach a separate page with your name and Student ID# at the top.

List Household (Defined above) Full Name	Age	Relationship to Student	College Attending (if any)	Will be enrolled at least half time? (Dual Enrollment does NOT count) (Yes or No)
		Self	ETBU	

C. Independent Student's Household Income Information

I filed a 2021 Tax Return

Complete section below.

Check the box that applies:

- I have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into my FAFSA.
- I 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.
- I am unable or chose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a 2021 IRS Tax Return Transcript or signed copy of my tax return.
- Myself and my spouse filed separate 2021 Tax Returns. I will submit both 2021 Tax Transcripts or signed copies of both our 2021 Tax Returns.

Can't find my Tax return?
How to Request a Tax Transcript or Proof of Non-filing

- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-994
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. This form can be used to obtain a Tax Transcript or Proof of Non-filing.

Complete section below.

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

Student Printed Name

Student ID Number

X _____

Student Signature

Date

I did not file a 2021 Tax Return

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority. See box to left on How to Request Tax Transcript or Proof of Non-filing.

____ Check here if Proof of Non filing is attached.

____ Check here if IRS Proof of Non-filing **CANNOT** be obtained. You must complete the Verification Statement of Non-filing below and list sources of income. You must also attach a copy of Form 4506-T.

Verification of Non-filing Statement 2021

I _____ certify that I was not required to file a 2021 Tax Return. I have attempted to obtain proof of my non-filing status from the IRS, but was unable to obtain the required documentation.

Signature of Non-filer
Student

Relationship to
Student

Sources of 2021 Income		
<i>Income Source</i>	<i>Amount Earned</i>	<i>W-2 Provided</i>

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

Return this form and any supporting documents by uploading them, AS A PDF ONLY, to our Upload Portal at www.etbu.edu/upload-fa. Directions and links for saving forms and documents as a PDF can be found at the Upload Portal.