



2024-2025 Verification Worksheet - Independent Student FAQ's

Your 2024-2025 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 (2022 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 TigerConnect by selecting **Documents Requiring Attention**. The **Missing Documents** link will list out documents needed, including those related to verification.

Documents			
Missing Documents			
2023-2024			
Document Type	Document Status	Due Date	Comments
Change of income 2023-2024	Incomplete	-	Please sign the tax returns and resubmit. Thank you.
Asset information	Required	-	Cash, investments and business income required for correction.
Documents on File			

What happens if I do not complete verification?

Students who do not complete verification during the 2024-25 year cannot receive state, federal and some institutional financial aid for the entire 2024-25 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, 2024. 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 if I or my spouse applied for a tax extension?

An individual who is required to file a 2022 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- A signed statement listing the sources of any 2022 income and the amount of income from each source;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2022; **and**;
- 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 2022.

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.

What if I (or my spouse) filed an Amended IRS Tax Return?

An individual who filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

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.



2024-2025 Independent Student Verification Worksheet

Your 2024-2025 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. Family Size

Family Includes:

- The student.
- The student's spouse, if applicable.
- The student's children if the following are true: They live with the student (or live apart because of college enrollment); They receive more than half of their support from the student; and they will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true: They live with the student; They receive more than half of their support from the student; and they will continue to receive more than half their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2024-2025 FAFSA. As a result, the student should not include any unborn children in the family size.

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

List Household (Defined above) Full Name	Age	Relationship to Student
		Self

C. Independent Student's Household Income Information

I filed a 2022 Tax Return select option below

I did not file a 2022 Tax Return.

I transferred information directly from IRS to the FAFSA.

I had to hand enter my Income information and was not able to transfer director from the IRS.

Must provide either:

1. A signed copy of the 2022 income tax return with schedules.
2. OR obtain a tax transcript from the IRS.

How to Request a Tax Transcript and 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 – 1-800-908-9946

- 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.

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2022 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 2022

I, _____, certify that I was not required to file a 2022 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 / Date

Relationship to Student

Sources of 2022 Income		
<i>Employer's Name</i>	<i>IRS W-2 or an Equivalent Document Provided?</i>	<i>Annual Amount Earned in 2022</i>
<i>Total Amount of Income Earned from Work.</i>		\$

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

Student Printed Name

Student ID Number

Student Signature

Date

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.