

# 2023-2024 Aggregate 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                             | Student's First Name | Student's M.I. | Student's Social Security Number         |
| Student's Street Address (include apt. no.)     |                      |                | Student's Date of Birth                  |
| City  | State                | Zip Code       | Student's Email Address                  |
| Student's Home Phone Number (include area code) |                      |                | Student's Alternate or Cell Phone Number |

## B. Student's Family Information

List below the people in the student's household.

For Dependent:

- **The student**
- **The parents** (including a stepparent) even if the student doesn't live with the parents
- **The parents' other children** if the parent will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards even if the children do not live with the parents.
- **Other people** if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2024. **DO NOT INCLUDE FOSTER CHILDREN**

For Independent:

- **The student**
- **The student's spouse**, if the student is married
- **The student's or spouse's children** if the student or spouse will provide more than half of their support from July 1, 2023, through June 30, 2024, even if the children do not live with the student.
- **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. **DO NOT INCLUDE FOSTER CHILDREN**

| Full Name                   | Age       | Relationship | College Attending ( <b>do not include parent in college</b> ) | Will be Enrolled In College at Least Half Time |
|-----------------------------|-----------|--------------|---|--|
| <i>Marty Jones(example)</i> | <i>28</i> | <i>Wife</i>  | <i>Central University</i>                                     | <i>Yes</i>                                     |
|                             |           | <i>Self</i>  |   |  |
|                             |           |              |   |  |
|                             |           |              |   |  |
|                             |           |              |   |  |
|                             |           |              |   |  |
|                             |           |              |   |  |

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student's Name: \_\_\_\_\_ Last 4 of SSN: \_\_\_\_\_

**C. Student's Income Information to Be Verified**

**1. TAX RETURN FILERS— Important Note:** The instructions below apply to the student (and spouse, if the student is married). Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2021 or had a change in marital status after the end of the 2021 tax year on December 31, 2021.

**Instructions:** Complete this section if the student and spouse **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 [FAFSA.gov](https://fafsa.gov) or the *myStudentAid app*. In most cases, no further documentation is needed to verify 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.*

A **2021 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

**Check the box that applies:**

- The student has used or will use the IRS DRT on FAFSA to transfer filed 2021 IRS income tax return information into the student's FAFSA.
- If student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the institution with a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.**

\_\_\_\_\_ **If not using the IRS DRT:** check here if **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.

\_\_\_\_\_ **If not using the IRS DRT:** check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

**2. IF YOU DID NOT FILE TAXES FILL OUT THE INFORMATION BELOW—** The instructions and certifications below apply to the student (and spouse, if the student is married). Complete this section if the student and spouse will not file and are not required to file a 2021 income tax return with the IRS.

**Check the box that applies:**

- The student and spouse were not employed and had no income earned from work in 2021.
- The student and/or spouse were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

**COMPLETE THIS STEP IF YOU DID NOT FILE TAXES:** If more space is needed, provide a separate page with the student's name and ID number at the top.

| Employer's Name                        | 2021 Amount Earned | Provide IRS W-2 |
|--|--------------------|-----------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00</i>  | <i>Yes</i>      |
|  |                    |                 |
|  |                    |                 |
|  |                    |                 |

Student's Name: \_\_\_\_\_ Last 4 of SSN: \_\_\_\_\_

**D. Parent's Income Information to Be Verified IF STUDENT IS DEPENDENT**

**1. TAX RETURN FILERS— Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2020 or had a change in marital status after the end of the 2020 tax year on December 31, 2021.

**Instructions:** Complete this section if the parents 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 FAFSA.gov or the myStudentAid app.* In most cases, no further documentation is needed to verify 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. 2021 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2021 electronic IRS income tax return has been accepted by the IRS.

**Check the box that applies:**

- The parents have used or will use the IRS DRT on FAFSA to transfer filed 2021 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT on FAFSA and instead will provide the school a **2021 IRS Tax Return Transcript(s)**. (signature not required) or a **signed copy of the 2021 tax return and applicable schedules**.

2021 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

- If the parents filed separate IRS income tax returns, **2021 IRS Tax Return Transcripts a signed copy of the 2021 tax return and applicable schedules** must be provided for both.

\_\_\_\_\_ **If not using the IRS DRT:** check here if a **2021 IRS Tax Return Transcript(s) a signed copy of the 2021 tax return and applicable schedules** is provided.

\_\_\_\_\_ **If not using the IRS DRT:** check here if a **2021 IRS Tax Return Transcript(s) a signed copy of the 2021 tax return and applicable schedules** will be provided later.

**2. IF YOU DID NOT FILE TAXES FILL OUT THE INFORMATION BELOW—** The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2021 income tax return with the IRS.

**Check the box that applies:**

- Neither parent was employed and had no income earned from work in 2021.
- One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

**COMPLETE THIS STEP IF YOU DID NOT FILE TAXES:** If more space is needed, provide a separate page with the student's name and ID number at the top.

| Employer's Name                        | 2021 Amount Earned | Provide IRS W-2 |
|--|--------------------|-----------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00</i>  | <i>Yes</i>      |
|  |                    |                 |
|  |                    |                 |
|  |                    |                 |

- Provide a copy of IRS Verification of Non-Filing transcript (Form 4506-T available at [www.irs.gov](http://www.irs.gov)).

**E. Other Information to Be Verified**

**1. Receipt of SNAP Benefits**

The parents or student certify that a member of the household, received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as the Food Stamp Program) sometime during 2021 or 2022. SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433-3243).

The Dependent student household includes:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of their support from July 1, 2021, through June 30, 2022, or if the other children would be required to provide parental information if they were completing a FAFSA for 2021–2022. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2022

The Independent student household includes:

- The student
- The student's spouse, if the student is married
- The student's or spouse's children if the student or spouse will provide more than half of their support from July 1, 2021, through June 30, 2022, even if the children do not live with the student.
- 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, 2022

Note: If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued the SNAP benefits in 2021 or 2022.

**2. Child Support Paid**

**ONE OF THE PARENTS, STUDENT OR SPOUSE INCLUDED IN THE HOUSEHOLD** paid child support in 2021. List below the names of the persons who paid the child support, the names of the persons to whom the child support was paid, the names of the children for whom the child support was paid, and the total annual amount of child support that was paid in 2021 for each child.

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

| Name of Person Who Paid Child Support | Name of Person to Whom Child Support was Paid | Name of Child for Whom Support Was Paid | Amount of Child Support Paid in 2021 |
|---------------------------------------|---|---|--------------------------------------|
|                                       |   |   |                                      |
|                                       |   |   |                                      |
|                                       |   |   |                                      |

Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided;
- A statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks or money order receipts.

**F. Certification and Signature**

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

**WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (If dependent)

\_\_\_\_\_  
Date

**Verification of 2021 IRS Income Tax Return Information for  
Individuals with Unusual Circumstances**

**Individuals Who Filed an Amended IRS Income Tax Return**

If an individual filed an amended IRS income tax return for tax year 2021, provide both of the following:

- A signed copy of the original 2021 IRS income tax return that was filed with the IRS and Tax Return Transcript
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

**Verification of 2021 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity**

**Theft** An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2021 income tax return and applicable schedules the individual filed with the IRS; **and**
- 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

**Verification of 2021 Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns**

If an individual filed or will file a 2021 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2021 income tax return(s).

Student's Name: \_\_\_\_\_ Last 4 of SSN: \_\_\_\_\_

**Identity and Statement of Educational Purpose  
(To Be Signed at the Institution)**

The student must appear in person at **Emmanuel College** to verify his or her identity by presenting valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.

***In addition, the student must sign, in the presence of the institutional official, the following:***

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Emmanuel for 2023-2024.

\_\_\_\_\_  
**(Student's Signature)**

\_\_\_\_\_  
**(Date)**

\_\_\_\_\_  
**(Emmanuel College Witness's Signature)**

\_\_\_\_\_  
**(Date)**