



## 2023-2024 Verification Worksheet - Independent

Your 2023-2024 application for financial aid has been selected for verification. Submit the requested documentation detailed below as soon as possible. Processing of your financial aid file cannot continue, and no financial aid can be awarded until the required information has been received. The authority for Converse University to review the requested documents can be found in CFR Title 34, Part 668.

**STUDENT NAME:** \_\_\_\_\_ **Converse ID:** \_\_\_\_\_

### Section 1: Household Information

List below the people that you and/or your spouse (if married) will support between July 1, 2023, and June 30, 2024. Be sure to include yourself, your spouse and your dependent children. Include other people only if they lived with you and received more than half their support from you and/or your spouse at the time you applied for financial aid and will continue to receive this support between July 1, 2023, and June 30, 2024. In addition, provide the name of the university or college for family members who will be attending **at least half-time** during the 2023-2024 academic year and who will be enrolled in a degree, diploma or certificate program. Always list yourself.

Full Name of Family Member	Relationship to Student	Date of Birth (mm/dd/yy)	Age	Name of University or College Attending in 2023-2024
	Self			Converse University

### Section 2: Verification of 2020 Income Information for Student Tax Filers

**A. 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 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.* In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

- The student has used the IRS DRT on the FAFSA to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The student has not yet used the IRS DRT *on the FAFSA*, but will use the tool to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The student is unable or chooses not to use the IRS DRT *on the FAFSA*, and instead will provide the institution with a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules.

- Check here if a 2021 IRS Tax Return Transcript(s) is provided.
- Check here if a 2021 IRS Tax Return Transcript(s) will be provided later. Date the Transcript will be provided: \_\_\_\_\_

**B. Tax Return Non-Filers:**

**Important Note:** The instructions below apply to the student and spouse (if the student is married).

**Instructions:** Complete this section if the student (and spouse, if married) did not file and are not required to file a 2020 income tax return with the IRS.

**Check the box that applies:**

- The student (and spouse) was not employed and had no income earned from work in 2021. The signatures on this form verifies the student (and spouse) did not work and were not required to file a federal 1040 Form for 2021.
- The student (and spouse) was employed in 2020. **Please provide copies of all 2021 IRS W-2 Forms issued to the student (and spouse) from all employers.**

**Section 4: Certifications, Signatures and Contact Information**

By signing this *Verification Worksheet*, I (we) certify that all information reported to qualify for federal financial assistance is complete and correct. At least one parent must sign.

**Student Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Student's Mailing Address:**

\_\_\_\_\_  
**Street City State and Zip**

**Student's Telephone Numbers:**

\_\_\_\_\_  
**Home Work Cell**

**How to obtain a 2021 IRS Tax Return Transcript:**

- **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.

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