



2023-2024 Verification Worksheet – Dependent

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 your parent(s)* will support between July 1, 2023, and June 30, 2024. Be sure to include yourself, your parent(s) and their other dependent children. Include other people only if they lived with your parent(s) and received more than half their support from your parent(s) 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. Do not include the university or college for your parent(s).

**Parent(s) means your biological/adoptive parents if they are married to each other or are not married to each other and live together; the biological/adoptive parent with whom you live if your parents are divorced, separated or if one parent is deceased; or the biological/adoptive parent and stepparent with whom you live. Parent(s) does not mean grandparents, foster parents, aunts and uncles unless they have legally adopted you.*

| 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 |
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Section 2: Verification of 2021 Income Information for Student Tax 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 on the Web at [FAFSA.gov](https://fafsa.gov).* 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 2021 income tax return and applicable schedules.**
 - Check here if a 2021 IRS Tax Return Transcript(s) or signed copies of the Federal 1040 form and schedules is provided.
 - Check here if a 2021 IRS Tax Return Transcript(s) or signed copies of the Federal 1040 form and schedules will be provided later.

A. Tax Return Non-Filers:

Instructions: Complete this section if the student did not file and is not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2021. My signature on this form verifies I did not work and was not required to file a federal 1040 Form for 2021.
- The student was employed in 2021. **Please provide copies of all 2021 IRS W-2 forms issued to the student from all employers.**

Section 3: Verification of 2021 Income Information for Parent Tax 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 2021 or had a change in marital status after 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) when completing the FAFSA.* In most cases, no further documentation is needed to verify 2021 income information that was transferred to the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The parents have used the IRS DRT *on the FAFSA* to transfer 2021 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT *on the FAFSA*, but will use the tool to transfer 2021 IRS income tax return information to the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT *on the FAFSA*, and instead will provide the institution with **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.**
- Check here if a 2021 IRS Tax Return Transcript(s) or signed copies of the Federal 1040 form and schedules is provided.
- Check here if a 2021 IRS Tax Return Transcript(s) or signed copies of the Federal 1040 form and schedules will be provided later.

A. Tax Return Non-Filer:

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents did 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 neither had income earned from work in 2021. The signature(s) below verifies the parent(s) did not work and are not required to file a federal 1040 Form for the 2021 tax year. **Parents who did not file taxes in 2021 must provide a "Statement of Non-Filing" letter from the Internal Revenue Service.**
- Check here if confirmation of non-filing is provided.
- Check here if confirmation of non-filing will be provided later.
- One or both parents were employed in 2021. **Please provide copies of all 2021 IRS W-2 forms issued to the parents from all employers.**

How to obtain a 2021 IRS Tax Return Transcript for the student and parent(s):

- **Get Transcript by Mail** – Go to 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, 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.

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: _____

Parent Signature: _____ Date: _____

Student's Mailing Address: _____

| | Street | City | State and Zip |
|------------------------------|--------|-------|---------------|
| Student's Telephone Numbers: | _____ | _____ | _____ |
| | Home | Work | Cell |
| Parent's Telephone Numbers: | _____ | _____ | _____ |
| | Home | Work | Cell |

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