



STANDARD 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, we will compare your FAFSA with the information on this verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You, and a parent whose information was reported on the FAFSA, must complete and sign this verification worksheet, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us 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's Identification (ID) 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. Dependent Student's Family Information

Number of Household Members: List below the people in the parents' household. Include:

- 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 the children's 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 a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2024.

Number in College: Include in the space below information about any household member, excluding the parents, who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024, include the name of the college.

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

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|---------|---|
| | | <i>Self</i> | | |
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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 _____

Student's ID Number _____

C. Dependent Student's Income Information to Be Verified1. TAX RETURN FILERS - **Important Note:** The instructions below apply to the student.

Instructions: Complete this section if the student 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 in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.
- ☐ The student has 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 the student's FAFSA.
- ☐ The 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**.

A 2021 IRS Tax Return Transcript may be obtained through:

- 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.

_____ Check here if a **2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules** is provided.

_____ Check here if a **2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

2. TAX RETURN NONFILERS - The instructions and certifications below apply to the student. Complete this section if the student will 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.
- ☐ The student was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued to the student by his/her employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2021 |
|---|---|------------------------------|
| (Example) ABC's Auto Body Shop | Yes | \$4,500.00 |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

D. Parent's Income Information to Be Verified

1. TAX RETURN FILERS - **Important Note:** The instructions below apply to each parent included in the household. Notify the Office of Financial Aid 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) 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 parents have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.
- ☐ The parents 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 the student's FAFSA.
- ☐ The parents are unable or choose 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**.

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

- 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.

If the parents filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** must be provided for each.

_____ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.

_____ 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. TAX RETURN NONFILERS - 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 neither had 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 or an equivalent document 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.

Student's Name _____

Student's ID Number _____

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

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2021 |
|---|---|---------------------------------|
| (Example) <i>ABC's Auto Body Shop</i> | <i>Yes</i> | <i>\$4,500.00</i> |
| | | |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | |

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022, that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority or a signed statement certifying that the individual attempted to obtain confirmation of nonfiling from the IRS or other relevant tax authority and was unable to obtain the required documentation.

_____ Check here if confirmation of nonfiling or a signed statement is provided.

_____ Check here if confirmation of nonfiling or a signed statement will be provided later.

E. Certifications and Signatures

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, sent to prison, or both.

Print Student's Name

Student's ID Number

Student's Signature

Date

Parent's Signature

Date

*Submit this worksheet to the Auburn Montgomery Office of Financial Aid
P.O. Box 244023, Montgomery, AL 36124-4023; fax (334) 244-3913*

You should make a copy of this worksheet for your records.