



2023-2024 Verification Worksheet

for Dependent Students

Federal Student Aid Programs

Your student aid application was selected by the U. S. Department of Education for review. We are required by federal law to compare your application with information on this form and with your and your parent's 2021 federal tax information.

If any items have to be corrected, the Truman State University Financial Aid Office will send changes to the Central Processing System electronically. You will receive a new SAR, which allows you to see the changes and results.

What you should do:

- **Submit all documents as soon as you can - by June 1** if you expect aid to be ready when classes begin, **Aug. 21, 2023** to the Truman State University Financial Aid Office.
- Pay deposits and pre-enroll when scheduled, because verifications for enrolled students are done first.
- Respond promptly to requests for additional information.

Until verification is complete federal aid offers cannot be paid. The final deadline is April 1, 2024, or prior to withdrawal from school. (For Pell Grant only, the deadline will be given in the Federal Register or will be within 120 days after the last day of enrollment, whichever is earlier.)

A. Student Information

Last Name	First Name	M.I.	Date of Birth	Student Banner ID #
Street Address		City	State	ZIP
Student Phone Number		Parent Phone Number		
<p>***By providing an email address below, you are authorizing the Truman State University Financial Aid Office to communicate through email if any additional information is required for verification. Please DO NOT provide email addresses if you do not check your email account regularly.***</p>				
Student Email Address		Email Address for Parent (whose information is provided on FAFSA)		

B. Parent Marital Status

What was your **parent's** marital status on the date you completed the FAFSA? ***Additional instructions on page 4***
If your parent's marital status is different today from the date you filed the FAFSA, attach a statement indicating the change and date of change.

- | | | |
|--|---|----------------------------------|
| <input type="checkbox"/> Never Married | <input type="checkbox"/> Married/Remarried | <input type="checkbox"/> Widowed |
| <input type="checkbox"/> Unmarried Living Together | <input type="checkbox"/> Divorced/Separated | |

C. Family Information

List all people in your parent's household in the chart below. **Be sure to include:**

- The Student
- The parent(s) (Including a step-parent) Do not include your non-custodial parent ***Additional instructions on page 4***
- The parent(s) other children if the parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024
- Other people only if they currently live with the parent(s) and the parent(s) 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

Also write in the name of the college for any household member, **excluding your parent(s)**, who will be enrolled, at least half-time in a degree, diploma, or certificate program at a post-secondary educational institution any time between July 1, 2023 and June 30, 2024. **Do not list high school students participating in dual credit courses as being in college.** If you need more space, attach a separate page with the student's name and Student ID number at the top.

Full Name	Age	Relationship to Student	Attending College during 2023-24	Name of College if enrolled 2023-24 school year
		Self	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Truman State University
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

D. Student Income Information

Have you or will you file a 2021 U.S. Federal Tax Return?

YES: Submit your Student 2021 Tax Return Transcript from the IRS if the Data Retrieval Tool (DRT) **wasn't** successfully used when completing the FAFSA. Tax transcripts are not the same as copies of the IRS 1040 tax returns. ****Instructions for requesting a transcript on page 4****

NO: Complete the Non-Tax Filers Only section below if the student **did not/will not file and is not required to file** a 2021 Federal IRS Tax Return.

Non-Tax Filers Only - Check the one box that applies:

The student was not employed and had no income earned from work in 2021.

The student was employed in 2021. Complete the table below and submit all W-2 and 1099 forms documenting student income. If you were not issued a W-2 from your employer, provide a written statement explaining why not, along with any other documentation you may have been issued

This section for non-tax filers only

Source of Income/ Employer Name	2021 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.	
	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Victims of Identity Theft: If you the student were a victim of an IRS identity theft for the 2021 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 4 for additional instructions.

Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2021 tax year. The IRS has been made aware of this tax-related identity theft.

E. Parent Income Information

Complete the section below for the parent(s) listed in Section C of this worksheet. If two parents were listed in the household, provide information below for both.

Have you or will you file a 2021 U.S. Federal Tax Return?

YES: Submit your Parent 2021 Tax Return Transcript from the IRS if the Data Retrieval Tool (DRT) **wasn't** successfully used when completing the FAFSA. Tax transcripts are not the same as copies of the IRS 1040 tax returns. ****Instructions for requesting a transcript on page 4****

NO: Complete the Non-Tax Filers Only section below if the parent **did not/will not file and is not required to file** a 2021 Federal IRS Tax Return. **In addition, confirmation from the IRS of non-filing status is REQUIRED.** ****Instructions for requesting a Verification of Non-Filing letter on page 4****

Non-Tax Filers Only - Check the one box that applies:

The parent was not employed and had no income earned from work in 2021. **Additional information may be requested.**

The parent was employed in 2021. Complete the table below and submit all W-2 and 1099 forms documenting parent income. If you were not issued a W-2 from your employer, provide a written statement explaining why not, along with any other documentation you may have been issued.

This section for non-tax filers only

Source of Income/ Employer Name	2021 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.	
	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Victims of Identity Theft: If you the parent were a victim of an IRS identity theft for the 2021 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 4 for additional instructions.

Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2021 tax year. The IRS has been made aware of this tax-related identity theft.

F. Child Support Paid

Did either the student or parent/stepparent listed in Section C of this worksheet pay child support during 2021?

- Yes (If yes, you must complete the chart below - *Report Annual Amounts/List Each Child Separately*)
******DO NOT include children that are listed as part of the Household Size in Section C.******
- No

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Child's Age	Amount of Child Support Paid in 2021
				\$ / year
				\$ / year
				\$ / year

G. 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, be sentenced to prison, or both.

 Student's Handwritten Signature (Required) Date _____ _____ Date _____
 Parent's Handwritten Signature (Required)

Verification Checklist

Before submitting this worksheet, double check that you have done the following:

- Listed everyone in the household in Section C, including parent(s) and other siblings if applicable
- Attached Student/Parent IRS Tax Return Transcripts or successfully used the IRS Data Retrieval Tool in FAFSA for tax filers (see page 4)
- Completed the Student/Parent Non-Tax Filer Charts in Section D and E for non-tax filers and attached all supporting income documentation
- Completed Section F Child Support Paid
- Student Signed/Dated Worksheet
- Parent Signed/Dated Worksheet

FAILURE TO READ AND COMPLETE ALL SECTIONS OF THIS WORKSHEET WILL RESULT IN DELAYS TO YOUR VERIFICATION PROCESS AND MAY DELAY DISBURSEMENT OF FINANCIAL AID



Please do not submit W-2 forms for 2021 tax filers unless they are requested from our office.

Non-tax filers are still required to submit all W-2 forms.

RETURN THIS WORKSHEET BY MAIL, EMAIL, OR FAX TO:

Truman State University
 Financial Aid Office MC 103
 100 E. Normal, Kirksville MO 63501
 Email: finaid@truman.edu
 Fax: 660-785-7389

Parental Information for Dependent Students

If your parents are divorced or separated, you should provide information for the parent you lived with more during the 12 months prior to completing your FAFSA. If this parent is remarried as of the date you completed the FAFSA, you should also provide information for your stepparent.

If your legal parents (biological and/or adoptive) are not married to each other and live together, you should provide information about both of them regardless of their gender.

Requesting A Tax Transcript

- **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 (normally this will be the address used with the 2021 tax return was filed), (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.
- **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.
- **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.
- **Automated Telephone Request**—1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.

What To Do If You Have Trouble Obtaining A Transcript

- We strongly recommend that you have the transcript sent to you and then you submit a copy to our office and keep a copy for your own records.
- Be sure to submit all pages of the transcript.
- When did you submit your 2021 return? It can take up to 8-12 weeks after filing your return before transcript information is available.

Verification Requirements For Individuals Filing An Amended Return

For individuals who have filed an amended return, additional information is needed for verification purposes. Please note, the IRS Tax Return Transcript only shows the information submitted on the original return and does not reflect changes made by the amendment. Therefore, the following items are required:

- 2021 IRS Tax Return Transcript
- A signed copy of the individual’s 1040X—Amended Return

IRS Data Retrieval

- For individuals who used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer unchanged 2021 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making corrections to the FAFSA, the Financial Aid Office will use this information instead of a tax transcript.
- ******Please note, in some instances, a tax transcript may still be needed.******

Verification of Non-Filing Letter

If a parent did not file a Federal 2021 Tax Return, they are required to obtain documentation from the IRS that they did not file. An IRS Verification of Non-Filing Letter provides proof that the IRS has no record of a filed 1040 for the individual. A Verification of Non-Filing Letter can be obtained by the following:

On the Web - Go to www.irs.gov and select “Get Your Tax Record” and then click “Get Transcript Online”. You will need to create a user name.

By Mail - Print IRS Form 4506-T online at www.irs.gov. Check the box next to #7 to confirm verification of non-filing status. Complete #9 with the 2021 tax period ending 12/31/2021.

Victims of Identity Theft

IRS Tax Return Transcripts and the Data Retrieval Tool on the FAFSA are not available for victims of identity theft. An individual who is a victim of identity theft and cannot get a return transcript must contact the IRS’s Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. After the IPSU authenticates the tax filer’s identity, they can request an alternate transcript called a **Transcript Database View (TRDBV)**. Please indicate on this worksheet that you are a victim of Identity Theft and submit the TRDBV in place of a tax return transcript.