Dependent
Verification Worksheet (V1)
2023-2024

V1

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states 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 institutional 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 institutional verification document, attach any required documents, and submit the form and other required documents to the financial aid office at Baptist University of Florida. We may ask for additional information.

PLEASE READ ALL INSTRUCTIONS CAREFULLY. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

Student Information

Student's Name: _____
         First   M.I.   Last

Date of Birth: _____   Social Security Number:_____

Home Phone: _____   Cell Phone:_____

Email: _____   Work Phone: _____

Address: _____
         Street/P.O. Box   City   State   Zip Code

Family Information

List below the people in the <u>parents' household</u>. Include:
- The student
- The parent(s) (including a stepparent) even if you don't live with your parent(s).
- The parents' other children if the parents 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.

Include the name of the college for any household member, excluding the parent(s), who will be enrolled <u>at least half time</u> in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024. If more space is needed, provide a separate page with the student's name and Social Security Number at the top. *(List everyone in the household. Do not include college information for parents.)*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		Self		

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.

Verification of 2021 IRS Income Tax Return Information for <u>Student Tax Filers</u>

Important note: The instructions below apply to the student who filed taxes in 2021.

Instructions: Complete this section if the student <u>filed or will file</u> 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 <u>FAFSA.gov</u>. In most cases, no further documentation is needed to verity 2021 IRS income tax return 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 <u>has used</u> the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.

☐ The student <u>has not yet used</u> 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 <u>unable or chooses not to use</u> the IRS DRT in FAFSA on the Web, and instead will provide the school 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:

- <u>Get Transcript by Mail</u> – Go to www.IRS.gov and 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.
- <u>Get Transcript Online</u> – Go to www.IRS.gov and 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.
- <u>Automated Telephone Request</u> – 1-800-908-9946. Transcripts is generally received within 10 business days from the IRS's receipt of the telephone request.
- <u>Paper Request Form</u> – IRS Form 4506T-EZ or Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse 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.

Verification of 2021 Income Information for <u>Student Non-tax Filers</u>

*Important note: The instructions below apply to the student who did **NOT** file taxes in 2021*

Instructions: Complete this section if the student will not file and <u>is not required</u> 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 equivalent document is provided. *[Provide copies of all 2021 IRS W-2 forms or equivalent documents issued by each employer to the student].* 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 Social Security Number at the top.

Employer's Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2021
Suzy's Auto Body Shop (example)	Yes	$4,500.00

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 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 non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

☐ Check here if confirmation of non-filing or a signed statement is provided.

☐ Check here if confirmation of non-filing or a signed statement will be provided later.

Verification of 2021 IRS 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 <u>filed or will file</u> 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 <u>FAFSA.gov</u>.* 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.

Check the box that applies:

☐ The parents <u>have used</u> the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.

☐ The parents <u>have not yet used</u> 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 <u>unable or choose not to use</u> the IRS DRT in FAFSA on the Web, and instead will provide the school 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:
- <u>Get Transcript by Mail</u> – Go to www.IRS.gov and 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.
- <u>Get Transcript Online</u> – Go to www.IRS.gov and 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.
- <u>Automated Telephone Request</u> – 1-800-908-9946. Transcripts is generally received within 10 business days from the IRS's receipt of the telephone request.
- <u>Paper Request Form</u> – IRS Form 4506T-EZ or 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**.**

Verification of 2021 Income Information for <u>Parent Non-tax Filers</u>

Important Note: The instructions and certifications below apply to each parent included in the household.
Instructions: Complete this section if the parents will not file and <u>are not required</u> to file a 2021 income tax return with the IRS.

Check the box that applies:

☐ Neither parent was employed nor 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 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.

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

Employer's Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2021
Suzy's Auto Body Shop (example)	*Yes*	*$2,000.00*

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 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 non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

☐ Check here if confirmation of non-filing or a signed statement is provided.

☐ Check here if confirmation of non-filing or a signed statement will be provided later.

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 jail, or both.

_____   _____
Print Student's Name   Student's ID Number

_____   _____
Student's Signature (Required)   Date

_____   _____
Parent's Signature (Required)   Date