

2023-2024 Verification Worksheet - Dependent Household Information & Tax Filing Status



Your Free Application for Federal Student Aid (FAFSA®) was selected for review in a process called Verification, which requires our office, per federal law, to compare your FAFSA® results with required acceptable documentation. Our office may ask for additional documentation to resolve conflicting information in addition to this worksheet. In our review, if there are differences, our office will submit the corrections back to the federal processor and you will receive an updated FAFSA® reflecting the corrections. If you have questions about Verification, contact our office as soon as possible so that your financial aid will not be delayed.

STEP 1 - STUDENT INFORMATION

PLEASE PRINT LEGIBLY

Last Name	First Name	M.I.	WPU ID Number	Date of Birth
Phone Number (include area code)		Email address (primary contact method)		

STEP 2 - FAMILY HOUSEHOLD INFORMATION

As of today, what is the marital status of your FAFSA parent(s)*? Choose one box below.

Note: When two married persons live as a married couple but are separated by physical distance (or have separate households), they are considered married for FAFSA® purposes.

☐ My biological/adoptive parents are unmarried but live together (report information for both parents)

☐ My biological/adoptive parents are married to each other since MM/YYYY: _____ (report information for both parents)

☐ My biological/adoptive custodial parent* is married to my stepparent since MM/YYYY: _____ (report information for the custodial parent and stepparent)

☐ My biological/adoptive custodial parent* is (mark one and enter date):

☐ Separated/Divorced ☐ Widowed (Date: MM/YYYY: _____)

(report information for only your custodial parent)

☐ My biological/adoptive parent is single and was never married (report information for only this parent)

*If your biological/adoptive parents are separated/divorced from each other, provide information for the parent that you lived with the most during the last 12 months. If you did not live with one biological/adoptive parent more than the other, indicate the parent who provided more than half of your financial support during the last 12 months, or during the most recent year that you actually received financial support from a parent.

List the people in your FAFSA® parent(s)' household including:

- yourself and your FAFSA® parent(s) (including stepparent) even if you don't live with your FAFSA parent(s), and
- your FAFSA parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2023 through June 30, 2024, or (b) the child(ren) would be required to provide parental information if they were completing a FAFSA® for 2023-2024. Include children who meet either of these standards, and
- other people if they live with your FAFSA® parent(s) now, and your 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.

Write the names of ALL household members in the space(s) below. Also write the name of the college/university for any household member, excluding your parent(s), who will be attending college/university at least half time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship to Student (Parent, Stepparent, Sibling, Grandparent, etc.)	College/University Attending during 2023-2024	Will be Enrolled at Least Half Time (Yes or No)
Missy Jones (example)	18	Sister	Central University	Yes
		Self	Warner Pacific University	
		Parent	N/A	No

STEP 3 - TAX FILING STATUS AND INCOME INFORMATION—CALENDAR YEAR 2021

(both student and parent must check a box)

Warner Pacific University recommends using the **IRS Data Retrieval Tool/Link to IRS** within the FAFSA® to complete tax return verification for those that filed a 2021 Federal Income Tax Return. If you are unable or choose not to use the Data Retrieval Tool, you must submit a copy of your **2021 IRS 1040 Tax Return information including schedules 1, 2 and 3** to the university through one of the following methods:

- **Signed copy of filed 1040 Tax Return**—make a copy of the 1040 tax return and schedules 1, 2 and 3 that you submitted to the IRS. At least one tax payer listed on the form must sign where it says “your signature” on page two of the 1040 tax return form.
- **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.
- **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.
- **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. Paper forms are available on the IRS website at www.irs.gov.

STUDENT INFORMATION YEAR - 2021	PARENT INFORMATION YEAR - 2021	REQUIREMENT
<input type="checkbox"/> I filed a 2021 Federal Income Tax Return (skip step 4)	<input type="checkbox"/> I filed a 2021 Federal Income Tax Return (skip step 4)	STUDENT & PARENTS: <ul style="list-style-type: none"> • Use the IRS Data Retrieval Tool/Link to IRS in the FAFSA *OR* • Submit a Signed copy of your 2021 1040 Federal Income Tax Return including Schedules 1, 2 & 3 submitted to the IRS *OR* • Order a “Tax Return” Transcript from the IRS <ul style="list-style-type: none"> – Mail, Fax, Bring in, or Scan and email the transcript when received
<input type="checkbox"/> I worked in 2021, but am not required to file a Federal Income Tax Return (complete step 4)	<input type="checkbox"/> I worked in 2021, but am not required to file a Federal Income Tax Return (complete step 4)	STUDENT & PARENTS: <ul style="list-style-type: none"> • Complete Verification of Income in step 4 • Provide copies of W2 forms from all employers for 2021 PARENTS: Order a Verification of Non-Filing Letter from the IRS using IRS Form 4506-T <ul style="list-style-type: none"> – Mail, Fax, Bring in, or Scan and email the letter when received
<input type="checkbox"/> I did not work or earn income in 2021 (skip step 4)	<input type="checkbox"/> I did not work or earn income in 2021 (skip step 4)	STUDENT: No additional documentation required. PARENTS: Order a Verification of Non-Filing Letter from the IRS using IRS Form 4506-T <ul style="list-style-type: none"> – Mail, Fax, Bring in, or Scan and email the letter when received

STEP 4 - THOSE THAT WORKED BUT DID NOT FILE A TAX RETURN

(skip if you filed taxes OR did not earn any income)

Employer’s Name	Person Who Earned Income	IRS W-2 Provided?	Total Amount Earned in 2021
<i>(Example) Warner Pacific University</i>	<i>Self</i>	<i>Yes</i>	<i>\$2,300.00</i>
			\$
			\$
			\$
			\$

STEP 5 - REQUIRED SIGNATURES ON THIS WORKSHEET

Each person signing this form certifies that all the information reported is complete and correct. *A hand written signature, not typed, is required.*
The student and at least one parent must sign and date.

Student

Date

Parent

Date

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