

2023-2024 Verification Worksheet - Independent 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 student's marital status? Choose one box below.

- Single, Never Married (report only student information)
- Married/Remarried* since MM/YYYY: _____ (report information for you and your current spouse)
- Divorced/Widowed/Separated* since MM/YYYY: _____ (report only student information)

*If your marital status has changed since December 31, 2021, you will not be able to use the IRS Data Retrieval/Link to IRS in the FAFSA® and must submit your **tax return information** and copies of your W2 forms to complete the tax return verification.

List the people in your household including:

- **Yourself and your spouse if applicable, and**
- Your or your spouse's children, if you or your spouse will provide more than half of the child(ren)'s support from July 1, 2023 through June 30, 2024, even if a child does not live with you, **and**
- other people if they live with you now, and you or your spouse provides 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 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 <small>(Spouse, Child, Stepchild, Grandparent, etc.)</small>	College/University Attending during 2023-2024	Will be Enrolled at Least Half Time (Yes or No)
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		Self	Warner Pacific University	

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

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	SPOUSE INFORMATION (IF MARRIED) YEAR - 2021	REQUIREMENT
<input type="checkbox"/> I filed a 2021 Federal Income Tax Return (skip step 4)	<input type="checkbox"/> My spouse filed a 2021 Federal Income Tax Return (skip step 4)	<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"/> My spouse worked in 2021, but is not required to file a Federal Income Tax Return (complete step 4)	<ul style="list-style-type: none"> • Complete Verification of Income in step 4 • Provide copies of W2 forms from all employers for 2021 • 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"/> My spouse did not work or earn income in 2021 (skip step 4)	<ul style="list-style-type: none"> • 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 must sign and date.*

Student _____

Date _____

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