



2023-2024 Verification Worksheet

Dependent Student

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 and your parents reported on your FAFSA. To verify that you provided correct information, the financial aid office will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid office. We reserve the right to ask for additional information. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed.

A. Dependent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security 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

- Household Members:** List below the people in your parent(s)' household. Excluding foster children. Include:
 - The student
 - The parents (including a step-parent) 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 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 the other people's support and will continue to provide more than half of their support through June 30, 2024.
- Number in College:** In addition, please include below information about any household member, excluding the parents, who 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, attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>EGCC</i>	

***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: _____

C. Dependent Student's Income Information to Be Verified

1. **TAX RETURN FILERS—Important Note:** If the student filed, or will file, an amended 2021 IRS tax return, see instructions below.

Instructions: Complete this section if the student, filed or will file a 2021 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to [FAFSA.gov](https://fafsa.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

- ☐ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- ☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to transfer 2021 IRS income information into the student's FAFSA once the student has filed a 2021 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- ☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2021 IRS tax return transcript—DO NOT provide a photocopy of your copy of the income tax return.**

HOW TO OBTAIN A TAX RETURN TRANSCRIPT:

You indicated on your 2023-24FAFSA that you (and/or your spouse) filed or will file a 2021 federal income tax return with the IRS (form 1040). In order for our office to proceed with processing your federal financial aid, you must use one of the following ways to verify the income and tax information submitted on the FAFSA:

OPTION #1: Update the FAFSA using the "IRS Data Retrieval Tool" (Recommended Method)

1. Log into your 2023-24 FAFSA at fafsa.gov and select "Make FAFSA Corrections."
2. Navigate to the "Financial Information" section of the FAFSA.
3. Select "Use the IRS Data Retrieval Tool" to transfer your 2021 federal income tax data electronically from the IRS into the FAFSA.
4. Select "yes" to transfer your 2021 federal income tax data to your FAFSA
5. Once you have transferred your tax data and are back to the FAFSA, be sure to sign and submit the corrected FAFSA.
6. We will receive the corrected version of the FAFSA electronically within 5-10 business days.

OPTION #2: Order by Phone and Submit an IRS "Tax Return Transcript" to the Financial Aid Office

1. Order an IRS "Tax Return Transcript" for any 2021 tax returns submitted by you.
2. To order by phone: Call 800-908-9946,
 - Enter your social security number
 - Enter the digits from your most recent filed tax return mailing address
 - Enter 2021
 - Select Option #2 for a Tax Return Transcript
3. You should receive your Tax Return Transcript in the mail within 5-10 business days after placing your order.
4. Once you receive the transcript in the mail, make a copy for yourself, and submit it to Financial Aid Office.

OPTION #3: Submit your signed Federal Income Tax Return to the Financial Aid Office

1. Make a copy of your (and/or your spouse's) 2021 federal tax return (Form 1040) along with schedule(s) 1, 2 & 3, if filed.
2. Make sure to sign your name on the signature line.
3. Write your name on it and submit it to our Financial Aid Office.

Notes: If you have filed your taxes as Married Filing Separately you will be ineligible to use the IRS Data Retrieval Tool (Option 1) and should proceed with Option 2 or 3.

- ☐ Check here if the student's IRS tax return transcript is attached to this worksheet.
- ☐ Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

☐ The student has been granted a **Filing Extension** by the IRS
If an individual is required to file a 2021 IRS Income Tax Return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return" that was filed with the IRS for tax year 2021;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021; and
- A copy of IRS form W-2 for each source of employment income received for tax year 2021 and, if self-employed, a signed statement certifying the amount of individual's adjusted gross income (AGI) and the U.S. Income tax paid for the year 2021.

☐ The student has filed an **Amended 2021 IRS Income Tax Return**
If an individual filed an Amended IRS Income Tax Return for 2021 provide both of the following:

- A signed copy of the Original 2021 IRS Income Tax Return that was filed with the IRS or a **2021 IRS Tax Return Transcript** and
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," **that was filed with the IRS.**

Student's Name: _____

2. TAX RETURN NONFILERS—Complete this section if you, the student, will not file and are not required to file a 2021 income tax return with the IRS. **Note:** We may require you to provide documentation from the IRS that indicates a 2021 IRS income tax return was not filed 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 is attached. Attach copies of all 2021 W-2 forms issued to you by employers. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top.*

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
Total Amount of Income Earned from Work	\$	

D. Untaxed Information

Please report untaxed Portions of Individual Retirement Account (IRA) Distributions, Untaxed Portions of Pensions: IRA Deductions and Payments, Tax Exempt Interest Income, Education Tax Credits or Tax-deferred pension & retirement savings plans for on W-2's, Box 12a-d, codes D,E,F,G, H & S.

- Untaxed Portions of Individual Retirement Accounts (IRA) Distributions from 2021 Tax Return \$ _____
- Untaxed Portions of Pensions from 2021 Tax Return \$ _____
- IRA Deductions and Payments from 2021 Tax Return \$ _____
- Tax Exempt Interest Income from 2021 Tax Return \$ _____
- 2021 W-2 forms Box 12a-d, codes
D _____ E _____ F _____ G _____ H _____ S _____

Student's Name: _____

E. Parent's Income Information to Be Verified - Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—Important Note: If the student's parent(s), filed or will file, an amended 2021 IRS tax return see instructions below.

Instructions: Complete this section if the student's parent(s) filed or will file a 2021 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to [FAFSA.gov](https://fafsa.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.*

Check the box that applies:

- ☐ The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- ☐ The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2021 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*
- ☐ The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2021 IRS tax return transcript(s)—May provide a SIGNED photocopy of the income tax return.** If the parents are married, and separate 2021 tax returns were filed, 2021 IRS tax return transcripts must be submitted for each parent.

HOW TO OBTAIN A TAX RETURN TRANSCRIPT:

You indicated on your 2023-24FAFSA that you (and/or your spouse) filed or will file a 2021 federal income tax return with the IRS (form 1040). In order for our office to proceed with processing your federal financial aid, you must use one of the following ways to verify the income and tax information submitted on the FAFSA:

OPTION #1: Update the FAFSA using the "IRS Data Retrieval Tool" (Recommended Method)

1. Log into your 2023-24FAFSA at fafsa.gov and select "Make FAFSA Corrections."
2. Navigate to the "Financial Information" section of the FAFSA.
3. Select "Use the IRS Data Retrieval Tool" to transfer your 2021 federal income tax data electronically from the IRS into the FAFSA.
4. Select "yes" to transfer your 2021 federal income tax data to your FAFSA
5. Once you have transferred your tax data and are back to the FAFSA, be sure to sign and submit the corrected FAFSA.
6. We will receive the corrected version of the FAFSA electronically within 5-10 business days.

OPTION #2: Order by Phone and Submit an IRS "Tax Return Transcript" to the Financial Aid Office

1. Order an IRS "Tax Return Transcript" for any 2021 tax returns submitted by you.
2. To order by phone: Call 800-908-9946,
 - Enter your social security number
 - Enter the digits from your most recent filed tax return mailing address
 - Enter 2021
 - Select Option #2 for a Tax Return Transcript
3. You should receive your Tax Return Transcript in the mail within 5-10 business days after placing your order.
5. Once you receive the transcript in the mail, make a copy for yourself, and submit it to Financial Aid Office.

OPTION #3: Submit your signed Federal Income Tax Return to the Financial Aid Office

1. Make a copy of your (and/or your spouse's) 2021 federal tax return (Form 1040) along with schedule(s) 1, 2 & 3, if filed.

2. Make sure to sign your name on the signature line.
3. Write your name on it and submit it to our Financial Aid.

Notes: If you have filed your taxes as Married Filing Separately you will be ineligible to use the IRS Data Retrieval Tool (Option 1) and should proceed with Option 2 or 3. This form is for instructional use only. There is no need to return this form to our office.

☐ Check here if an IRS tax return transcript(s) is attached to this worksheet.

☐ Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

☐ The student's parent(s) has been granted a **Filing Extension** by the IRS

If an individual is required to file a 2021 IRS Income Tax Return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return" that was filed with the IRS for tax year 2021;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021; and
- A copy of IRS form W-2 for each source of employment income received for tax year 2021 and, if self-employed, a signed statement certifying the amount of individual's adjusted gross income (AGI) and the U.S. Income tax paid for the year 2021.

☐ The student's parent(s) have filed an **Amended 2021 IRS Income Tax Return**

If an individual filed an Amended IRS Income Tax Return for 2021 provide both of the following:

- A signed copy of the Original 2021 IRS Income Tax Return that was filed with the IRS or a **2021 IRS Tax Return Transcript** and
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Student's Name: _____

2. **TAX RETURN NONFILERS**—Complete this section if you, the student, will not file and are not required to file a 2021 income tax return with the IRS. **Note:** We may require you to provide documentation from the IRS that indicates a 2021 IRS income tax return was not filed with the IRS.

Check the box that applies:

☐ The parent(s) was not employed and had no income earned from work in 2021.

☐ The parent(s) 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 is attached. Attach copies of all 2021 W-2 forms issued to you (and, if married, to your spouse) by employers. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top.*

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
Total Amount of Income Earned from Work	\$	

F. Untaxed Information

Please report untaxed Portions of Individual Retirement Account (IRA) Distributions, Untaxed Portions of Pensions: IRA Deductions and Payments, Tax Exempt Interest Income, Education Tax Credits or Tax-deferred pension & retirement savings plans for on W-2's, Box 12a-d, codes D,E,F,G, H & S.

- a. Untaxed Portions of Individual Retirement Accounts (IRA) Distributions from 2021 Tax Return \$ _____
- b. Untaxed Portions of Pensions from 2021 Tax Return \$ _____
- c. IRA Deductions and Payments from 2021 Tax Return \$ _____
- d. Tax Exempt Interest Income form 2021 Tax Return \$ _____
- e. 2021 W-2 forms Box 12a-d, codes
D _____ E _____ F _____ G _____ H _____ S _____

G. Certification and Signatures

Each person signing below certifies that all of the information reported on it is complete and correct. The student and one parent whose information was reported must sign and date.

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

Print Student's Name

Student ID Number

Student's Signature

Date

Parent's Signature

Date