

## 2022-2023 Verification Worksheet – Independent V5

Your Free Application for Federal Student Aid (FAFSA) was selected for a process called verification. Federal regulations require that we check the accuracy of the information provided on the 2022-2023 FAFSA. Final eligibility for financial aid cannot be determined until the requested documentation is received and reviewed.

**List below the people in your household:**

_____	_____	N _____	( _____ ) _____
Last Name	First Name	Student ID #	Phone

Write the names, age, and relationship to the student of all household members in the space(s) below. Also, write in the name of the college attending for any household member who will be attending at least half time between July 1, 2022 and June 30, 2023, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page and include the student's name and ID number at the top.

### Section A. Household Information

Full Name	Age	Relationship to Student	College Attending for 2022/2023	Enrolled at least half-time? (Y/N)
1. Yourself and your spouse (if you are married)				
		Self	NSU	
		Spouse		
2. Your children (stepchildren), if any, if you will provide MORE than half of their support between July 1, 2022 and June 30, 2023. Also include any children who would be required to provide your information if they were completing a FAFSA for 2022-2023 even if they do not currently live with you.				
3. Any other people that now live in your household, for whom you do and will provide MORE than half of their support through June 30, 2023				

**Section B. Student Tax and Income Information**

The 2020 Tax Return information can only be supplied by providing a tax return transcript or by using the IRS Data Retrieval Tool on the FAFSA.

Student	Spouse	TAX FILERS ONLY
<input type="checkbox"/>	<input type="checkbox"/>	I have used the IRS Data Retrieval Tool to transfer 2020 IRS tax return information into my FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	I have not yet used the IRS Data Retrieval Tool but will use the tool to transfer 2020 IRS tax information into my FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	I have attached a copy of my 2020 IRS Tax Return Transcript. (See Option 2). Personal copies of tax returns such as the 1040 (including schedules 1, 2, and 3) may be accepted.

**Ways to get an IRS Tax Return Transcript:**

- ✓ Request Transcript by Mail - Go to [www.irs.gov](http://www.irs.gov), under "Get a Tax Transcript", select "Request by Mail". Make sure to request your IRS Tax Return Transcript and NOT the Account Transcript.
- ✓ Request Transcript Online - Go to [www.irs.gov](http://www.irs.gov), under "Get Your Tax Record", select "Request Online", Make sure to request your Tax Return Transcript and NOT the Account Transcript.
- ✓ Automated Telephone Request 1-800-908-9946. Request your Tax Return Transcript.
- ✓ Paper Request Form - Go to [www.irs.gov](http://www.irs.gov). Enter 4506-T in search box. Print the form, fill out completely, and submit directly to the IRS (requested transcript will be mailed to the filing address of record with the IRS).

Student	Spouse	NON TAX FILERS ONLY		
<input type="checkbox"/>	<input type="checkbox"/>	I <u>did not</u> work and had no income earned from work in 2020.		
<input type="checkbox"/>	<input type="checkbox"/>	I worked in 2020 but I did not earn enough to be required to file taxes. (If you did work, please check mark whose income it was, list the employer, amount earned, and provide W-2's)		
		Name of Employer	Amount earned in 2020	Received a W-2? (Y/N)
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			

- ✓ Each parent is required to submit a letter of non-tax filing status from the IRS (dependent students are not required to submit proof of non-filing). You can obtain this letter by submitting IRS form 4506-T (Check Box 7) to the IRS. Form 4506-T can be found at [www.irs.gov](http://www.irs.gov). The IRS will then forward a letter to you and our office will require a copy of that letter along with these completed verification documents.
- ✓ Parents can also receive verification of non-filing by requesting a copy of the tax transcript at [www.irs.gov](http://www.irs.gov). If a transcript is not found, a statement saying you did not file taxes will display on the screen. Print the statement and provide a copy to our office.
- ✓ Please provide a copy of your W-2(s). If you do not have a copy, you may request your wage and income transcript from [www.irs.gov](http://www.irs.gov)



**Section C. Identity and Statement of Educational Purpose**

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The student **must appear in person** at Northeastern State University (Financial Aid Department) to verify his or her identity by **presenting a valid government-issued photo identification (ID)**, such as, but not limited to, a driver’s license, other state-issued ID, or passport. **The institution will maintain a copy of the student’s photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student’s ID.**

In addition, the student must sign, in the presence of a NSU Financial Aid Representative, the following:

**Statement of Educational Purpose**

I certify that I, \_\_\_\_\_, am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending: \_\_\_\_\_ for 2022-2023.  
(Print Student’s Name)

\_\_\_\_\_ for 2022-2023.  
(Name of Postsecondary Educational Institution)

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of the Financial Aid Representative: \_\_\_\_\_ Date: \_\_\_\_\_

**Section D. Certification and Signature**

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Signing this worksheet certifies that all of the information reported on it is complete and correct.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_