

2023-2024 Verification Worksheet

WEST TEXAS A&M UNIVERSITY FINANCIAL AID

WTAMU Box 60939, Canyon, TX 79016

Phone: 806-651-2055 FAX: 806-651-2924 Email: financial@wtamu.edu

Before you can receive financial aid for the 2023-2024 school year, the federal government requires that the university's financial aid office verify that your FAFSA information is correct. We must compare your FAFSA with the information on this worksheet and copies of your (and spouse's or parents') **2021 W2s, tax returns, Schedule 1, C, E and F (if part of the tax return)** and other required documents, including any listed on the student portal. If there are differences, your FAFSA award might change. We may ask for additional information. Complete this form as soon as possible to get financial aid promptly.

A. Student's Information

 Student's Last Name Student's First Name Student's M.I. Student's Buff ID Number

 Student's Phone Number (include area code) Student's Alternate or Home Phone Number

***** Follow the instructions for the chart below, based on your status as determined on the FAFSA.**

■ **DEPENDENT** – List below the people in your parents' household even if you do not live with your parents, and include:

- yourself **and** your parent(s) (including stepparent), list both parents if they live together, whether married or not
- **and** your parents' other children even if they do not live with your parents, if they are under 24 years of age and either (a) your parents will provide more than half of their support from July 1, 2023 through June 30, 2024, or (b) the children would be required to provide parental information if they were completing a 2023-2024 FAFSA.
- **and** other people if they now live with your parents, and your parents 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.

■ **INDEPENDENT** - List below the people in your (the student's) household, and include:

- yourself, **and** your spouse if currently married,
- **and** your or your spouse's children, if you or your spouse will provide more than half of the children's support from July 1, 2023 through June 30, 2024 even if a child does not live with you,
- **and** other people if they now live with you, and if you or your spouse currently 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.

Per instructions above, list below information for all eligible household members. *If you need space for more household members, attach a separate page with the student's name and Buff ID number at the top.*

Full Name	Date of birth	Age	Relationship to student	Name of College	Are they enrolled at least half-time in a college degree, diploma or certificate program? (Yes/No)
			Self		

With few exceptions, state law gives you the right to request, receive, review and correct information about yourself collected on this form. All signatures must be actual signatures, not computer-generated.

_____ Student signature

_____ Parent signature

Student's Name: _____ Buff ID # _____

B. Student's information: whether or not you earned any income in 2021, follow the instructions below. Notify our office if you had a change in marital status after December 31, 2021.

- Check here if, in 2021, you the student (and your spouse if you are currently married) earned **NO income** and did not file taxes and were not required to file taxes.
- **Students who are determined "Independent" by FAFSA, including students who are currently married, who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2022 that confirms that a 2021 income tax return was not filed by the student. An IRS Non-Filing Tax Transcript is also needed for a student's spouse who did not file 2021 taxes. *Instructions on how to obtain an IRS Non-Filing Tax Transcript are on the last page of this worksheet. Our office may request additional documentation.***

If **ANY** income was earned in 2021 by you the student (or by your spouse if you are currently married), check **ONE** of the two boxes below:

- You (and your spouse if you are currently married) earned income in 2021 and did NOT file a 2021 income tax return, will not file taxes, and were not required to file taxes.
- **Students who are determined "Independent" by FAFSA, including students who are currently married, who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2022 that confirms that a 2021 income tax return was not filed by the student. An IRS Non-Filing Tax Transcript is also needed for a student's spouse who did not file 2021 taxes. 2021 W-2s or equivalent documents are also needed for any income that was earned by the student (and spouse if currently married). List in the chart below ALL sources of income. *Instructions on how to obtain an IRS Non-Filing Tax Transcript are on the last page of this worksheet. Our office may request additional documentation.***
- You (or your spouse if you are currently married) filed or will file a 2021 income tax return. If you did not successfully link the taxes to your FAFSA with the IRS Data Retrieval Tool (DRT), you must provide 2021 IRS Tax Return Transcript(s) or a signed copy of 2021 income tax return(s) and applicable schedules. If student and spouse did not file a joint 2021 tax return, an IRS Tax Return Transcript or signed income tax return must be provided for each person (or an IRS Non-Filing Tax Transcript for a person who did not file a tax return). *Instructions for obtaining IRS Transcripts are on the last page of this worksheet.*
- ❖ If, in the instructions above, you are required to provide W-2s or equivalent documents, list in the box below **all 2021 income** earned by you (and your spouse if you are currently married) including W2 income, self-employment income, farm income, and/or income reported on Schedule E on the tax return.

Employer's Name	IRS W-2, 1099, Schedule C, E, or F, or an equivalent document provided?	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>Yes (example)</i>	<i>\$1500.00 (example)</i>
Total Amount of Income Earned From Work		\$

You MUST also submit the following documents for each type of income listed above:

- ALL W2s and 1099s for income earned from work (can substitute 2021 Wage and Income Transcript obtained from the IRS)
- Schedule C for Self-Employment income or loss
- Schedule E for Rental Real Estate, Royalties, Partnerships, S Corps, Estates, Trusts, etc.
- Schedule F for Farm income or loss

_____ Student signature

_____ Parent signature

Student's Name: _____ Buff ID # _____

C. Dependent Student Parent's Income Information (for each parent/stepparent included in the household). On this form, the word "parent" or "parents" also refers to a stepparent that is included in the household. Notify our office if your parent had a change in marital status after December 31, 2021.

- Check here if, in 2021, the parents earned **NO income** and did not file taxes and were not required to file taxes.
 - **A parent who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2022 that confirms that a 2021 income tax return was not filed. You must provide an IRS Non-Filing Tax Transcript(s) that includes the social security number of each parent in the household who did not file 2021 taxes. Instructions on how to obtain an IRS Non-Filing Tax Transcript are on the last page of this worksheet. Our office may request additional documentation.**

If **ANY** income was earned in 2021 by one or both parents, check **ONE** of the two boxes below:

- One or both parents earned income in 2021 and both parents did NOT file a 2021 income tax return, will not file taxes, and **were not required** to file taxes. List in the chart below **ALL** sources of income, amount earned and type of income. Provide copies of all 2021 IRS W-2 forms or equivalent documents.
 - **A parent who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2022 that confirms a 2021 income tax return was not filed. You must provide Non-Filing Tax Transcript(s) that include the social security number of each parent in the household who did not file 2021 taxes. Instructions on how to obtain a Non-Filing Tax Transcript are on the last page of this worksheet. Our office may require additional documentation.**
 - One or both parents filed or will file a 2021 income tax return. If you did not successfully link the taxes to your FAFSA with the IRS Data Retrieval Tool (DRT), and parents filed taxes jointly, you must provide their 2021 IRS Tax Return Transcript or a copy of their 2021 income tax return with a taxpayer signature, and applicable schedules. If the parent is currently married, but they and their spouse did not file a joint 2021 IRS income tax return, provide a 2021 IRS Tax Return Transcript or taxpayer-signed income tax return and applicable schedules for each parent (or an IRS Non-Filing Tax Transcript for a parent who did not file a tax return). *Instructions for obtaining IRS Transcripts are on the last page of this worksheet.*
- ❖ If, in the instructions above, you are required to provide W-2s or equivalent documents, list in the box below **all 2021 income** earned by the parents in the household and include W2 income, self-employment income, farm income, and/or income reported on Schedule E on the tax return. If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W-2, 1099, Schedule C, E, or F, or an equivalent document provided?	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>Yes (example)</i>	<i>\$1500.00 (example)</i>
Total Amount of Income Earned From Work		\$

You MUST also submit the following documents for each type of income that you listed:

- ALL W2s and 1099s for income earned from work (can substitute 2021 Wage and Income Transcript obtained from the IRS)
- Schedule C for Self-Employment income or loss
- Schedule E for Rental Real Estate, Royalties, Partnerships, S Corps, Estates, Trusts, etc.
- Schedule F for Farm income or loss

_____ Student signature _____ Parent signature

Student's Name: _____ Buff ID # _____

Basic steps for using the IRS Data Retrieval Tool (IRS DRT)

- ❖ www.fafsa.gov
 - Log in to your 23/24 FAFSA
 - Make FAFSA corrections
 - Navigate to financial information section, follow instructions to determine if eligible to use IRS DRT
 - If eligible, transfer 2021 IRS income tax information into your FAFSA

A **2021 IRS Tax Return Transcript** may be obtained through:

- ❖ 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.”
- ❖ Automated Telephone Request – 1-800-908-9946.
- ❖ Paper Request Form – Download form 4506-T from www.irs.gov, mail or fax the completed form to the appropriate address (or fax number) at the IRS.

A **2021 IRS Non-Filing Tax Transcript** may be obtained through:

- ❖ Get Transcript ONLINE – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Select *Verification of Non-Filing*.
- ❖ Get Transcript by MAIL – IRS Form 4506-T or 4506T-EZ from www.irs.gov, mail or fax the completed form to the appropriate address (or fax number) at the IRS. **Make sure to check box 7 for ‘Verification of Non-filing’.**

Have the IRS send tax return transcripts to you or your parents, **NOT** to the WTAMU Financial Aid Office. Then you or your parents will submit copies to WTAMU Financial Aid with your name and Buff ID number along with a notation of whether the report is for student, spouse, or parent.

D. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. The student and (if student is dependent) 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, sent to prison, or both.

Do not mail this worksheet to the U.S. Department of Education.

Submit this worksheet to the WTAMU Financial Aid Office.

You should make a copy of this worksheet and supporting documents for your records.

ACTUAL SIGNATURES ARE REQUIRED. (Typed names will not be accepted.)

_____ Date of signature

_____ Date of signature

_____ Student signature

_____ Parent signature