

2022- 2023 Verification Worksheet - Dependent

V1

Directions:

Your FAFSA form was selected for review in a process called "verification". In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your FAFSA form with the information provided on this form and with a Federal Tax Return Transcript of you and your parents 2020 federal tax forms. If there are differences between your FAFSA form and the documents you've submitted, corrections may be needed. **We cannot process your financial aid until verification has been completed.**

What you should do:

1. Collect your (and your parents') financial documents (2020 SIGNED Federal 1040 Tax Return or 2020 Federal IRS Tax RETURN Transcript, W-2(s), etc.).
2. Contact us if you have questions about this form.
3. Submit this completed worksheet, 2020 SIGNED Federal Tax 1040 or 2020 Federal IRS Tax Return Transcript (if unable to use the IRS Data Retrieval Tool), and any other documents to our office.
4. Please make sure this form is completed and signed by student and a parent.

Section A: Student Information (Please Print)

First Name	M.I.	Last Name	
Address (include apt. #)	City	State	Zip
Email address			
Check if student will be on campus <input type="checkbox"/> or off campus <input type="checkbox"/>			

Section B: Student's Household Information

List below the people in your parent(s) / stepparent household as listed on the 2022-2023 FAFSA that they will support between July 1, 2022 and June 30, 2023.

- ◆ You, the student
- ◆ Your parent (s)/stepparent (whose information you would have provided on the 2022-2023 FAFSA).
- ◆ Your parent(s)/stepparent's dependent children if your parent(s)/stepparent will provide more than half of their support from July 1, 2022, through June 30, 2023, or if the children would be required to provide parental information if they were completing a 2022-2023 FAFSA. Include children who meet either of these standards even if the children do not live with the parent(s).

Include other people as part of the family only if:

- ◆ They lived with your parent(s)/stepparent and received more than half of their support from your parent(s)/stepparent at the time you completed your 2022-2023 FAFSA, **AND**
- ◆ They will continue to receive more than half their support from your parent(s)/stepparent from July 1, 2022 through June 30, 2023.

NOTE: The number of household members must include both of the dependent student's legal biological or adoptive parents if the parents live together, regardless of the marital status or gender of the parents.

Full Name (Include Parents/Stepparents) <i>As listed on the FAFSA</i>	Age	Relationship	College/University	Will be Enrolled at Least Half Time: Yes or No
<i>Example: Missy Jones</i>	<i>18</i>	<i>Sister</i>	<i>Sample University</i>	<i>Yes</i>
		<i>Self</i>	<i>Methodist University</i>	

Of those listed above, print in the name of the college for any household member, excluding parents who will be enrolled at least half time, in a degree, diploma, or a certificate program at a postsecondary educational institution any time between July 1, 2022, and June 30, 2023. If more space is needed, attach a separate page with Student's name at the top.

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.

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MU Student Name: _____

Section C: Income Tax Information

Check ONE box that applies to you, and ONE box that applies to your parent(s) or stepparent that is listed on the 2022-2023 FAFSA.

Student		
<input type="checkbox"/> I FILED a 2020 Federal (IRS) Tax Return. Did you use the IRS Data Retrieval Tool to transfer your tax data directly from the IRS to the 2022-2023 FAFSA? <input type="checkbox"/> Yes <input type="checkbox"/> No: Submit a SIGNED copy of your 2020 Federal IRS Tax Return (1040); OR copy of 2020 Federal Tax Return Transcript ; OR update your FAFSA and use the Federal IRS Data Retrieval Tool . (See information below)	<input type="checkbox"/> I DID NOT FILE a 2020 Federal Tax Return BUT did EARN INCOME in 2020: however I was not required to file federal taxes. List the employer and amount earned for 2020: Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ ATTACH COPIES OF ALL 2020 FEDERAL (IRS) W-2 FORMS	<input type="checkbox"/> I WAS NOT EMPLOYED and had NO INCOME earned from work in 2020.

Parent 1		
<input type="checkbox"/> I FILED a 2020 Federal (IRS) Tax Return. Did you use the IRS Data Retrieval Tool to transfer your tax data directly from the IRS to the 2022-2023 FAFSA? <input type="checkbox"/> Yes <input type="checkbox"/> No: Submit a SIGNED copy of your 2020 Federal IRS Tax Return (1040); OR copy of 2020 Federal Tax Return Transcript ; OR update your FAFSA and use the Federal IRS Data Retrieval Tool . (See information below)	<input type="checkbox"/> I DID NOT FILE a 2020 Federal Tax Return BUT did EARN INCOME in 2020: however I was not required to file federal taxes. List the employer and amount earned for 2020: Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ ATTACH COPIES OF ALL 2020 FEDERAL (IRS) W-2 FORMS IRS Letter of Non-Filing is REQUIRED for parent if they did NOT file 2020 taxes** (See information below)	<input type="checkbox"/> I WAS NOT EMPLOYED and had NO INCOME earned From work in 2020. **IRS Letter of Non-Filing is REQUIRED for parent if they did NOT file 2020 taxes** (See information below)

Parent 2		
<input type="checkbox"/> I FILED a 2020 Federal (IRS) Tax Return. Did you use the IRS Data Retrieval Tool to transfer your tax data directly from the IRS to the 2022-2023 FAFSA? <input type="checkbox"/> Yes <input type="checkbox"/> No: Submit a SIGNED copy of your 2020 Federal IRS Tax Return (1040); OR copy of 2020 Federal Tax Return Transcript ; OR update your FAFSA and use the Federal IRS Data Retrieval Tool . (See information below)	<input type="checkbox"/> I DID NOT FILE a 2020 Federal Tax Return BUT did EARN INCOME in 2020: however I was not required to file federal taxes. List the employer and amount earned for 2020: Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ ATTACH COPIES OF ALL 2020 FEDERAL (IRS) W-2 FORMS IRS Letter of Non-Filing is REQUIRED for parent if they did NOT file 2020 taxes** (See information below)	<input type="checkbox"/> I WAS NOT EMPLOYED and had NO INCOME earned From work in 2020. **IRS Letter of Non-Filing is REQUIRED for parent if they did NOT file 2020 taxes** (See information below)

***IRS Data Retrieval Tool**

- ◆ Make a correction to your 2022-2023 FAFSA online and access the tool within the financial information section.
- ◆ Don't forget to sign and submit the 2022-2023 FAFSA correction.
- ◆ Allows on-line FAFSA filers to pull their 2020 federal tax data directly from the IRS to auto-fill the tax portion of the 2022-2023 FAFSA.
- ◆ Quickest way to get accurate federal IRS tax information to the Financial Aid Office.

****How to Obtain a Federal IRS Tax Return Transcript From the IRS *or* Letter of Non-Filing****

Be sure to request a Federal **IRS RETURN Transcript**.

We **cannot** accept a Tax Account Transcript

- ◆ Online request at <https://www.irs.gov/individuals/get-transcript> – Tax Return Transcript
- ◆ Automated Telephone Request: 1-800-908-9946.
- ◆ Paper Request: IRS Form 4506T - Must be used if you have moved since filing your taxes. Can be downloaded at www.irs.gov
- ◆ Visit your local IRS Office.

MU Student Name: _____

Section D: Verification of 2020 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS for 2020

Check the box that applies:

- Student
 Parent 1
 Parent 2
 Not Applicable

An Individual who is required to file a 2020 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for the tax year 2020, must provide;

- ◆ A copy of the IRS's approval of an extension beyond the automatic six-month extension for the tax year 2020. (e.g. IRS Form 2350);
- ◆ Verification of Non-filing (VFN) Letter (confirmation that the tax return has not been yet been filed) from the IRS dated on or after October 1, 2021 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- ◆ A copy of IRS form W-2 for each source of 2020 employment income received or an equivalent document;
and,
- ◆ If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2020.

Individuals Who Filed an Amended IRS Income Tax Return for 2020

Check the box that applies:

- Student
 Parent 1
 Parent 2
 Not Applicable

An Individual who filed an amended IRS income tax return for the tax year 2020 must provide a signed copy of the 2020 IRS form 1040X. "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- ◆ A 2020 Federal IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified;
or
- ◆ A SIGNED copy of the 2020 IRS Form 1040 and applicable schedules that were filed with the IRS.
or
- ◆ IRS DRT information on an IRS record with all tax information from the original tax return.

Individuals Who Were Victims of IRS Tax-Related Identity Theft for 2020

Check the box that applies:

- Student
 Parent 1
 Parent 2
 Not Applicable

An individual who was the victim of Federal IRS tax-related identity theft for 2020 must provide:

- ◆ A 2020 Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2020 IRS 1040 income tax return and applicable schedules the individual filed with the IRS; **and**
- ◆ A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

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MU Student Name: _____

Section D: Verification of 2020 Income Information for Individuals with Unusual Circumstances (continued)

Individuals Who Filed Non-IRS Income Tax Returns for 2020

Check the box that applies:

- Student
 Parent 1
 Parent 2
 Not Applicable

- ◆ A tax filer who filed a 2020 income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the 2020 tax account information issued by the relevant tax authority before verification can be completed.
- ◆ A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information for 2020.
- ◆ A tax filer who filed a 2020 income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

Income Information for Non-IRS Nontax Filers for 2020

Check the box that applies:

- Student
 Parent 1
 Parent 2
 Not Applicable

Residents of the Freely Associated States (Republic of the Marshall Islands, the Republic of Palau, the Federated States of Micronesia), and a U.S. territory or commonwealth or a foreign central government who are not required to file an income tax return under that taxing authority's rules must submit:

- ◆ A copy of their 2020 Wage and Tax Statement (or equivalent documentation) for each source of employment income **and**
- ◆ A signed statement identifying all of the individual's income and taxes for 2020.

Individuals - (Tax Filer/Non Tax Filers) whom 2020 Federal Tax Information cannot be located by the IRS

Check the box that applies:

- Student
 Parent 1
 Parent 2
 Not Applicable

An individual who did not retain a copy of his or her 2020 Federal tax account information and for whom that information cannot be located by the IRS (or other relevant taxing authority) must submit to the institution:

- ◆ Copies of all of their IRS Form 2020 W-2s, a wage and income transcript, or an equivalent document;
- ◆ Documentation from the IRS or other relevant taxing authority that indicates the individual's 2020 tax account information cannot be located; **and**
- ◆ A signed statement that indicates that the individual did not retain a copy of his or her 2020 tax account information.

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MU Student Name: _____

Section E: Certification and Signatures

- ◆ Each person signing below certifies that all of the information reported on the 2022-2023 Methodist University Verification Worksheet V1-Dependent student form is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date below.
- ◆ By signing this form, I (we) also understand that this information may require Methodist University to make changes to the originally reported FAFSA data that resulted from the verification process.

Warning: If you purposely give false or misleading information you may be fined, sent to prison, or both.

Please complete this worksheet, both student and parent must sign

Student Signature _____ Date _____

Parent Signature _____ Date _____

You should make a copy of the worksheet for your records.

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

Submit this worksheet to:

Methodist University
Office of Financial Aid
5400 Ramsey Street
Fayetteville, NC 28311-1498



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