

University of St. Augustine for Health Sciences

2023-2024 Verification Worksheet – Independent Student

Student Name:	USAHS ID/SSN:
Address:	Daytime Phone Number:
City/State/Zip Code:	Date of Birth:

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

Step 1 – Number of Household Members and Number in College

Please list below the people in the student's household. Include:



- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the child's support from July 1, 2023 through June 30, 2024, even if the child does not live with the student (do not include foster children (unless kinship foster care)).
- Other people if they now live with the student and the student or 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.

For any household member who is or 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** and anticipated **enrollment status** (do not include children who are in U.S. military service academies).

Full First and Last Name of ALL Student's Household Members	Age	Relationship to Student	Full Name of College. (Do not list names of Elementary or High Schools)	Will household member be enrolled at least Half Time in College (Yes/No)
		<i>SELF</i>	<i>University of St. Augustine</i>	<i>YES</i>

*****If more space is needed, provide a separate page with the student's name and ID number at the top*****

Step 2 – Financial Information – TAX RETURN FILERS

If you (and your spouse, if married) were not required to file a 2021 IRS Tax Return, please skip Step 2 and proceed to Step 3.

Check the box that applies (select only one box):

Student

- ☐ **The student and/or spouse (if married) used the IRS DRT (IRS Data Retrieval Tool) in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.**
- ☐ **The student and/or spouse (if married) has not yet used the IRS DRT (IRS Data Retrieval Tool) in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.**
- ☐ **The student and/or spouse (if married) is unable or chooses not to use the IRS DRT (IRS Data Retrieval Tool) in *FAFSA on the Web*, and instead will provide the school with a 2021 IRS Tax Return Transcript(s).**
- ☐ **The student and/or spouse (if married) are required to file a 2021 IRS income tax return and have been granted a filing extension by the IRS.** You must provide:
 - 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 for tax year 2021;
 - Verification of Non-Filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2022;
 - 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 the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.
- ☐ **The student and/or spouse (if married) filed a Non-IRS 2021 income tax return.** Please read below to determine what you must provide:
 - A tax filer who filed an 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 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.
 - A tax filer who filed an 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.
- ☐ **The student and/or spouse (if married) are a victim of IRS tax-related identity theft.** You must provide:
 - 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 2021 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.

Student Name: _____ USAHS ID/SSN: _____

Step 3 – Financial Information – NONTAX FILERS

Only complete Step 3 if the student and/or spouse (if married) will not file and is not required to file a 2021 income tax return with the IRS.

The student and spouse (if married) must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

- To obtain the IRS Verification of Non-Filing Letter, you can either use the IRS “Get Transcript Online” tool (if you have filed taxes in the past) or complete IRS Form 4506-T, check box 7 and submit the completed form to the IRS. Both Form 4506-T and the online tool can be found at www.irs.gov.

Check the box that applies:

- ☐ The student and spouse (if married) were not employed and had no income earned from work in 2021.
The student and spouse (if married) must submit the IRS Verification of Non-Filing Letter to the Office of Financial Aid.
- ☐ The student and/or spouse (if married) was employed in 2021 and have listed in the chart below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided (list every employer even if they did not issue an IRS W-2 form). *All copies of 2021 IRS W-2 forms along with the IRS Verification of Non-Filing Letter must be submitted to the Office of Financial Aid.*
- If you do not have a copy of your W-2, you must obtain an IRS Wage and Income Transcript or contact your employer for a duplicate copy. If you are still not able to supply a copy of your W-2, you must submit a separate signed statement and include supporting documentation stating why you are unable to provide your W-2 information.

Employer's Name	Annual Amount Earned in 2021	IRS W-2 or an Equivalent Document Provided?
ABC Shipping (example)	\$1,280	Yes

*** If more space is needed, provide a separate page with the student's name and ID number at the top. ***

Step 4 – Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct. *Warning: If you purposely give false or misleading information, you may be fined, sent to prison, or both.*

Print Student's Name	Student's USAHS ID/SSN
Student's Signature (Required)	Date
Spouse's Signature (Optional)	Date