

2023-2024 Verification Worksheet

Federal Student Aid Programs

D
Dependent

A. What is Verification? What must I do?

Your 2023-24 Free Application for Federal Student Aid (FAFSA) was selected by the U.S. Department of Education for review in a process called "Verification." The Financial Aid Office must compare your FAFSA with this worksheet and other financial data you submit and make any necessary corrections. The Financial Aid Office cannot make any federal financial aid available until all verification requirements have been met and the necessary corrections have been made.

INSTRUCTIONS:

1. Complete this worksheet. You and at least one parent must sign. If your parents are divorced or separated, answer the questions about the parent whose information was included on your FAFSA. If that parent is remarried, answer the question about that parent and your stepparent.
2. If you or your parent filed a 2021 tax return, use the IRS Data Retrieval Tool in *FAFSA on the Web* (<https://studentaid.gov/fafsa/>) to import parents' and student's 2021 tax data into your FAFSA, if you have not done so already.

As an alternative to using the IRS Data Retrieval Tool, you and your parents may upload via our Secure File Upload portal a signed copy of your 2021 federal tax return(s) with all schedules and forms sent to the IRS or a "Tax Return Transcript" received from the IRS.

If you did not file and were not required to file a 2021 IRS income tax return, complete the appropriate line item on page two of this form and provide the requested information and documents for that item.

If you or your parents have been a victim of IRS tax-related identity theft, send an e-mail to our office at FinAid@ThomasAquinas.edu to obtain further instructions.

3. Print, sign, and upload this worksheet and any necessary documents through the Secure File Upload portal on our website at: <https://www.thomasaquinas.edu/financialaid/fa-upload>

Questions? Contact the Financial Aid Office at (805) 421-5936 or by email at FinAid@ThomasAquinas.edu.

B. Student and Family Information

Student's First Name Middle Initial Last Name

Student's Social Security Number or School ID Number

Student's Street Address (include apt. no.)

Student's Date of Birth

City State Zip Code

Student's Home Phone Number (include area code)

List below the people in your parents' household. Include:

- Yourself and your parent(s) (including a stepparent), even if you do not live with your parents.
- Your parents' other children (even if they do not live with your parents) IF (a) your parents will provide more than half 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 FAFSA for 2023-2024. (Typically foster children do not count in household size as their costs are covered by foster care payments.)
- Your parents' unborn child if that child will be born by June 30, 2024 and your parents will provide more than half of the child's support from birth through June 30, 2024. (If there is a medical determination

of a multiple birth, then all expected children can be included.)

- 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.
- **Also provide college information in the last two columns 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.**

If you need more space, attach a separate page with the student's name and SSN or School ID number at the top.

Full Name (See directions above for who should be included.)	Age	Relationship	College Attending in 2023-24	Will be enrolled in college at least half time? (Yes or No)
John Jones (example)	20	Brother	Central University	Yes
		Self		

ADDITIONAL INFORMATION AND SIGNATURES REQUIRED ON NEXT PAGE

C. Student's Income Information

Check only ONE of the five boxes below and **UPLOAD** requested information and documents for that item **via the Secure File Upload portal**:

- a. ☐ I have used (or will use) the **IRS Data Retrieval Tool** in *FAFSA on the Web* to transfer my 2021 income tax information into the FAFSA.
- b. ☐ I have uploaded (or will upload) EITHER (1) a **signed copy of my 2021 federal tax return with all schedules and forms** normally sent to the IRS OR (2) a **"Tax Return Transcript"** received from the IRS.
- c. ☐ I have filed an **amended** 2021 IRS income tax return. (1) Upload a signed copy of your 2021 Form 1040X, "Amended U.S. Individual Income Tax Return" that was filed with the IRS, including any supporting documents and new or changed forms and schedules; AND (2) if you did not use the IRS Data Retrieval Tool to transfer your 2021 income tax information into the FAFSA, upload EITHER a signed copy of the 2021 federal tax return you originally filed with the IRS OR a "Tax Return Transcript" received from the IRS.
- d. ☐ I will not file and **am not required** to file a 2021 IRS income tax return and **I was not employed and I had no income earned from work in 2021**. No additional documentation is required.
- e. ☐ I will not file and **am not required** to file a 2021 IRS income tax return, **but I was employed in 2021**. List below the names of all employers, the amount earned from each in 2021 (even if the employer did not issue a W-2), and whether you received a W-2 or an equivalent document. **Upload copies of all 2021 W-2 forms or equivalent documents issued to you**. If more space is needed, attach a separate page with the student's name and SSN or School ID number at the top.

ONLY COMPLETE this table if box "e" above is checked.	Employer's Name	2021 Amount Earned	Have you received an IRS W-2 or equivalent document? (If so, please upload.)
	ABC Company (example)	\$2,132.47(example)	Yes

D. Parents' Income Information

Check only ONE of the five boxes below and **UPLOAD** requested information and documents for that item **via the Secure File Upload portal**:

(Notify the Financial Aid Office if the parents filed separate IRS income tax returns for 2021 or had a change in marital status after 12-31-2021.)

- a. ☐ Parents have used (or will use) the **IRS Data Retrieval Tool** in *FAFSA on the Web* to transfer 2021 income tax information into the FAFSA.
- b. ☐ Parents have uploaded (or will upload) EITHER (1) a **signed copy of their 2021 federal tax return with all schedules and forms** normally sent to the IRS OR (2) a **"Tax Return Transcript"** received from the IRS.
- c. ☐ Parents have filed an **amended** 2021 IRS income tax return. (1) Upload a signed copy of their 2021 Form 1040X, "Amended U.S. Individual Income Tax Return" that was filed with the IRS, including any supporting documents and new or changed forms and schedules; AND (2) if parents did not use the IRS Data Retrieval Tool to transfer 2021 income tax information into the FAFSA, upload EITHER a signed copy of the 2021 federal tax return parents originally filed with the IRS OR a "Tax Return Transcript" received from the IRS.
- d. ☐ Parents will not file and **are not required** to file a 2021 IRS income tax return and **neither parent was employed and neither parent had any income earned from work in 2021**. Upload a **Verification of Non-filing Letter** for each parent from the IRS. (See the attached instructions for how to obtain a Verification of Non-filing Letter.)
- e. ☐ Parents will not file and **are not required** to file a 2021 IRS income tax return, **but one or both were employed in 2021**. List below the names of all employers, the amount earned from each in 2021 (even if the employer did not issue a W-2), and whether you received a W-2 or an equivalent document. **Upload a Verification of Non-filing Letter for each parent** from the IRS. (See the attached instructions for how to obtain a Verification of Non-filing Letter.) **Upload copies of all 2021 W-2 forms or equivalent documents issued to parents**. If more space is needed, attach a separate page with the student's name and SSN or School ID number at the top.

ONLY COMPLETE this table if box "e" above is checked.	Employer's Name	2021 Amount Earned	Has an IRS W-2 or equivalent document been received? (If so, please upload.)
	ABC Company (example)	\$2,132.47(example)	Yes

E. Certification

Please **sign** and upload this form (pages 1 and 2) through the Secure File Upload portal (<https://www.thomasaquinas.edu/financialaid/fa-upload>).

Each person signing below certifies that all the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. Sign the printed form with a pen, or sign the PDF with a stylus or finger, or paste an image of your signature on the PDF. Do not type your signature.

Student's Signature

Date

Parent's Signature (only one parent's signature is needed)

Date

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

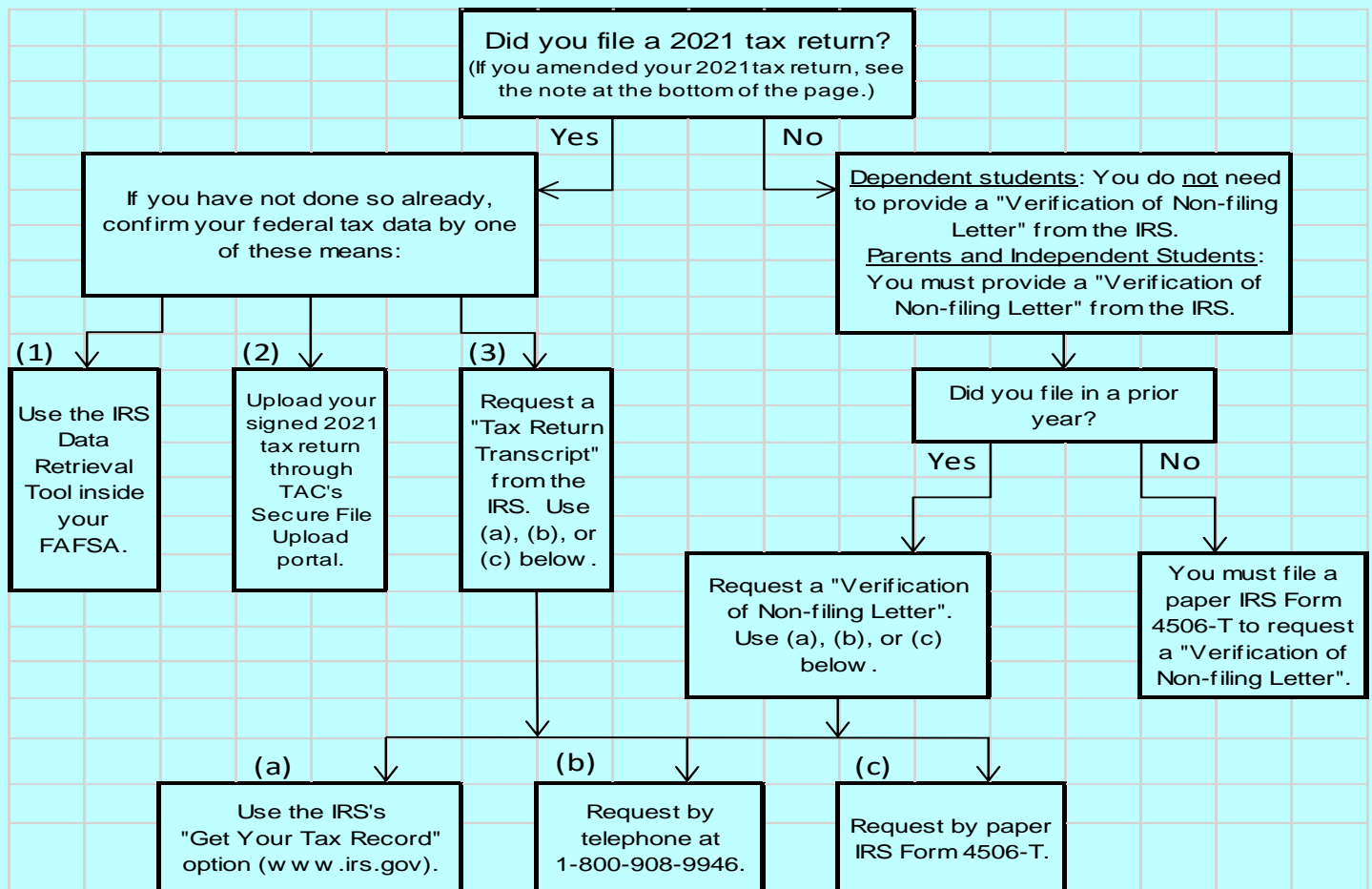


Verification of Your FAFSA: How to Confirm 2021 Federal Income Tax Data or Non-filing Status

Each year the Department of Education selects approximately one-third of all FAFSAs for “verification” which means the student and his parents are required to complete a supplemental worksheet and provide confirmation of the federal income tax information requested on the FAFSA.

In order for Thomas Aquinas College to verify your FAFSA (and consequently your eligibility for federal student aid), you and your parents must upload the following through Thomas Aquinas College’s Secure File Upload portal (<https://www.thomasaquinas.edu/financialaid/fa-upload>):

- I. A completed Verification Worksheet and
- II. Documents confirming parents’ and student’s 2021 federal tax data and/or non-filing status. See below:



If you need more information, call the Financial Aid Office at (805) 421-5936. We will be happy to help you!

Note: If you have **amended** your tax return, the methods outlined above will not confirm your corrected income tax information. Instead, do both of the following steps:

1. Upload a signed copy of your IRS Form 1040X ("Amended U.S. Individual Income Tax Return") that was filed with the IRS, including any supporting documents and new or changed forms and schedules;
2. If you did not use the IRS Data Retrieval Tool to transfer your original 2021 income tax information into the FAFSA, provide one of the following: a signed copy of the 2021 federal tax return you originally filed with the IRS or a "Tax Return Transcript" received from the IRS.