

2023-2024 Verification Worksheet

Federal Student Aid Programs

I
Independent

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 your spouse, if you are married) must sign.
2. If you or your spouse filed a 2021 tax return, use the IRS Data Retrieval Tool in *FAFSA on the Web* (<https://studentaid.gov/fafsa/>) to import your 2021 tax data into your FAFSA, if you have not done so already. (If you are married, and you and your spouse filed separate 2021 income tax returns, the IRS Data Retrieval Tool cannot be used. Instead, use one of the following alternatives.)

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

If you or your spouse 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 spouse 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 the student's household. Include:

- You, the student.
- Your spouse, if you are married.
- Your or your spouse's children if you will provide more than half of the children's support from July 1, 2023 through June 30, 2024, even if they do not live with you. (Typically foster children do not count in household size as their costs are covered by foster care payments.)
- Your unborn child if that child will be born by June 30, 2024 and you 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 you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2023 and 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)
Susan Jones (example)	28	Wife	Central University	Yes
		Self		

ADDITIONAL INFORMATION AND SIGNATURE(S) REQUIRED ON NEXT PAGE

Student's First Name

Middle Initial

Last Name

Student's Social Security Number or School ID Number

C. Student's Income Information (and spouse's, if the student is married)

Check only ONE of the five boxes below and provide the requested information and documents for that item:

(Notify the Financial Aid Office if the student and spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.)

- a. ☐ The student has used (or will use) the **IRS Data Retrieval Tool** in *FAFSA on the Web* to transfer his 2021 income tax information into the FAFSA.
- b. ☐ The student has uploaded (or will upload) EITHER (1) **a signed copy of his 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. ☐ The student has filed an amended 2021 IRS income tax return. (1) Upload a signed copy of student (and spouse's) 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 student did not use the IRS Data Retrieval Tool to transfer 2021 income tax information in the FAFSA, upload EITHER a signed copy of the 2021 federal tax return originally filed with the IRS OR a "Tax Return Transcript" received from the IRS.
- d. ☐ The student (and spouse, if the student is married) will not file and is (are) not required to file a 2021 IRS income tax return, and neither the student nor the spouse was employed, and neither the student nor the spouse had any income earned from work in 2021. Provide a **Verification of Non-filing Letter** for both the student and spouse from the IRS. (See attached instructions for how to obtain a Verification of Non-filing Letter.)
- e. ☐ The student (and spouse, if the student is married) will not file and is (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 a W-2 or an equivalent document was received. Upload a Verification of Non-filing Letter for both the student and spouse from the IRS. (See 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 the student and spouse. 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 attach.)
	ABC Company (example)	\$2,132.47(example)	Yes

D. 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 of the information reported is complete and correct. 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

Spouse's Signature (if the student is married)

Date

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

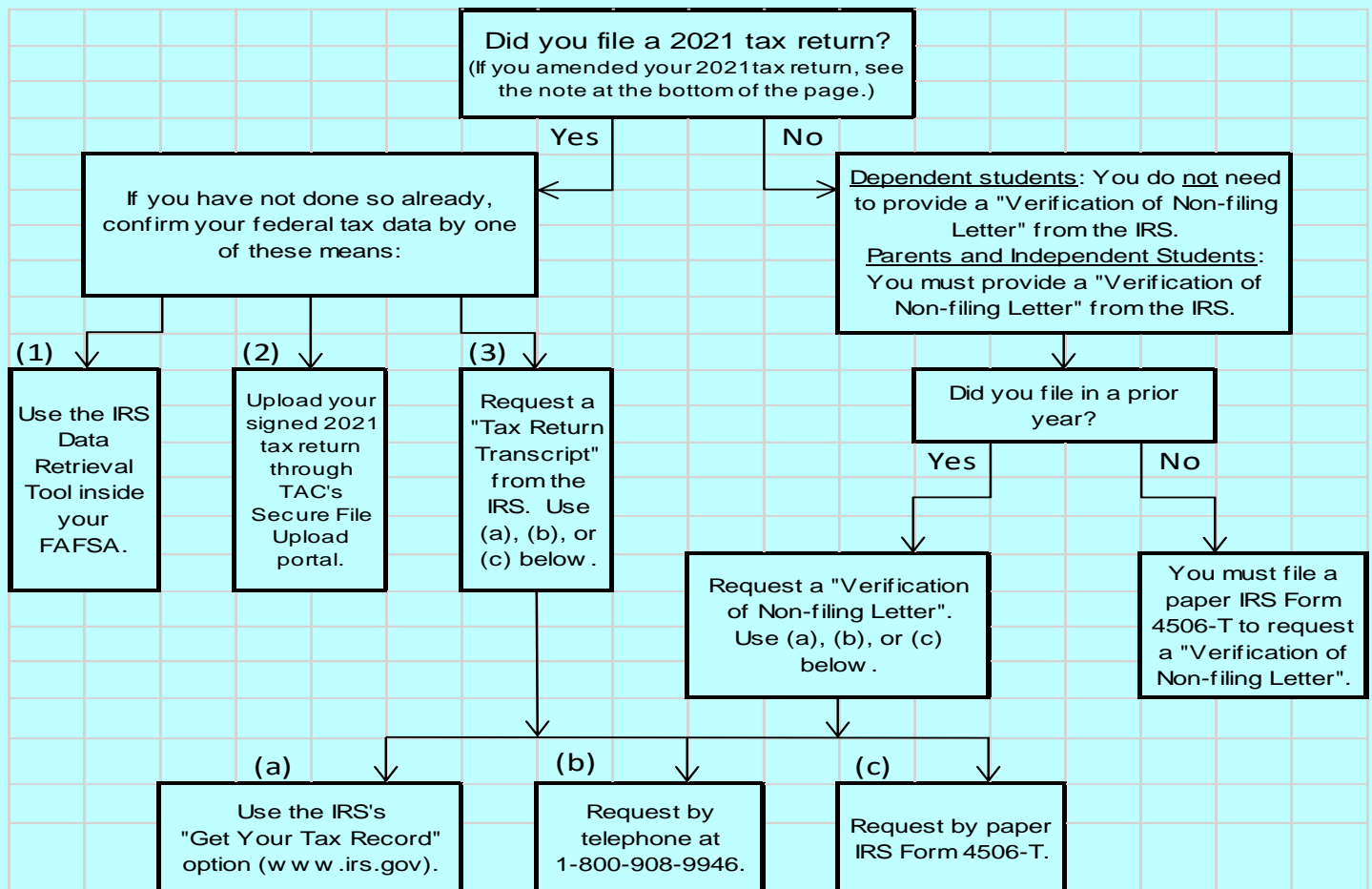


Verification of Your FAFSA: How to Confirm 2021 Federal Income Tax Data or Non-filing Status

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.