Office of Financial Aid 701 N. Clinton Street Defiance, OH 43512 Phone: 419-783-2376 Fax: 419-783-2579



DC Office Use Only	DATE
PIRS	
SIRS	
Contacted	
Completed	

2022-2023 Verification Worksheet

The U.S. Department of Education selected your financial aid application for a review in a process called verification. Verification is a process in which the Financial Aid Office determines the accuracy of the information provided on the FAFSA. Please provide the following information:

A. Student Information:

Student Name

Social Security Number

Email Address

Phone Number

B. Family Information:

Instructions: Write the names of all family members in your household. List the name of the college if this family member will enroll at least $\frac{1}{2}$ time between 7/1/2022 and 6/30/2023 in a degree, diploma or certification program at an eligible postsecondary educational institution.

Dependent Students: List the people that your parents will support between July 1, 2022 and June 30, 2023. Include yourself, your parents, and your parents' dependent children (if your parents provide more than half support).

Independent Students: List the people that you (and your spouse) will support between July 1, 2022 and June 30, 2023. Include yourself, your spouse, and your dependent children (if you provide more than half their support).

Full Name	Age	Relationship	College (enrolled ½ time)
		Self (Student)	Defiance College

C. Tax Information

Federal Tax Return Filing Status					
Student (and Spouse) Filing Status (check all that apply)		Parents Filing Status (check all that apply)			
	I have filed a tax retu	urn for 2020.		I have filed a tax retu	urn for 2020.
	Submit a 2020 Tax Submit a <u>signed co</u> Tax return or I used the Data re	Return from the IRS opy of the 2020 Federal trieval tool on the FAFSA.		Submit a 2020 Tax Submit a <u>signed</u> co return or I used the Data ret	Return from the IRS opy of the 2020 Federal Tax trieval tool on the FAFSA.
	I did not work or file	a tax return	I did not work or file a tax return		
	I worked in 2020 <u>but</u> <u>a tax return</u> . List eve amount earned for 2 employer did not iss below.	t was not required to file ery employer and 2020 even if the ue an IRS W-2 form	I worked in 2020 <u>but was not required to file a tax return</u> . List every employer and amount earned for 2020 even if the employer did not issue an IRS W-2 form below.		
Employ	yer's Name	Amount Earned in 2020 \$ \$ \$	Employ 	ver's Name	Amount Earned in 2020 \$ \$ \$

D. Untaxed Portions of IRA Distributions and Pensions (refer to your 2020 Federal Tax Return) Fill in \$0 if this does not apply.

IRS Form 1040-line 4a \$	minus 4b \$	Was this a rollover? 🗆 Yes	□No
E. Signatures			
Student Signature	Date	Parent Signature (if dependent)	Date

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

How to use the IRS Data Retrieval Tool

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. <u>To use the Data</u> <u>Retrieval Tool, complete the following steps:</u>

- Go to <u>fafsa.ed.gov</u> and select the "Start Here" button
- Log in using your FSA ID
- Select the "Continue" or "Make a Correction" button
- Select the "Financial Information" tab from the top of the page.

Instructions for the parent to request the parent IRS information:

- 1. Go to "Parent Financial Information" page
- 2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
- 3. If eligible, select which parent is providing information on the FAFSA
- 4. Enter the FSA ID for the parent providing the information
- 5. Click "Link to IRS"
- 6. For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on fafsa.gov, the IRS DRT web page, and on the *Student Aid Report*.

Instructions for the student to request the student IRS information:

- 1. Go to "Student Financial Information" page
- 2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
- 3. If eligible, click "Link to IRS"
- 4. For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on fafsa.gov, the IRS DRT web page, and on the *Student Aid Report*.
- 5. Proceed to the Sign and Submit page

If you are unable to complete the IRS Data Retrieval Tool, please submit an IRS tax transcript. The options are listed on the next page.

Tax filers can request a transcript, free of charge, of their 2020 tax return from the IRS in one of three ways:

Option #1: <u>Online Request</u>

Available on the IRS website at www.irs.gov

- Under the Tools heading on the IRS homepage, click Get a Tax Return Transcript
- Click Get Transcript by Mail
- Enter the tax filer's social security number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Click Continue
- In the Type of Transcript field, select Return Transcript and in the Tax Year field, select the year you are requesting.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within five to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

Option #2: <u>Telephone Request</u>

- Available from the IRS by calling **1-800-908-9946** (For victims of identity theft, please call 1-800-908-4490)
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select **Option 2** to request an IRS Tax Return Transcript and then enter **the year you are requesting**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within five to 10 days from the time the IRS receives the request.

Option #3

Paper Request

- Use IRS for 4506T-EZ,
 - Download at irs.gov/pub/irs-pdf/f4506tez.pdf
- Mail to the appropriate address located on page 2 of the form
- Wait 5-10 days upon receipt and processing of the form for delivery of your transcript

Upon receipt of your IRS Tax Transcript, please submit to the Financial Aid Office.

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