

**DV5 Aggregate**

**2023-2024 Verification Worksheet for Dependent Students**

As per federal regulation, IU must confirm the information you reported on your 2023-2024 Free Application for Federal Student Aid (FAFSA). To verify that you provided correct information we will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit them to Immaculata's Financial Aid office. Please note that we may ask for additional information. If you have questions about verification, contact our office as soon as possible so that your financial aid processing will not be delayed.

**Submit this worksheet to:** Immaculata University, Office of Financial Aid, 1145 King Road, Lillian P. Lettiere 219, Immaculata, PA 19345; Email: [finaid@immaculata.edu](mailto:finaid@immaculata.edu); Fax: 484 395 0068.

**A. Dependent Student's Information (please print)**

_____ Student's Last Name	_____ First Name	_____ Middle Initial	_____ Last 4 Digits of student Social Security #
_____ Student's Street Address (include apt. #)			_____ Student Date of Birth
_____ City	_____ State	_____ Zip Code	_____ Student Email Address
_____ Student Home or Cell Phone Number with Area Code			_____ Student Immaculata ID Number

**B. Dependent Student's Family Information**

List below the people in your parent(s) household. Include:

- You and your parent(s) including stepparents
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024.
- Include the name of the college for any household member (excluding your parent(s)) who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023 and June 30, 2024. If more space is needed, attach a separate page with the student's name and Social Security # at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time

Student's Name: \_\_\_\_\_ Last 4 Digits of Student's SSN: \_\_\_\_\_ page 2 of 4

**C. Dependent Student's Income Information to be verified – Check the Box that applies:**

- ☐ I, the student, will not file and am not required to file a 2021 income tax return with the IRS.  
**IMPORTANT NOTE:** The student must **also complete** and return a 2023-2024 Student Non-Filer Form.
- ☐ I, the student, have used the IRS Data Retrieval Tool in FAFSA on the web to retrieve and transfer 2021 IRS income information into the FAFSA, either on the initial FAFSA or when making corrections to the FAFSA. The student's school will use the IRS information that was transferred in the verification process.
- ☐ I, the student, have not used the IRS Data Retrieval Tool in FAFSA on the web, but will use the tool to retrieve and transfer 2021 IRS income information onto the FAFSA. (See instructions below).
- ☐ I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the web and I will submit to the school a copy of my **2021 IRS Tax Return Transcript**. To obtain a free IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and order a "Tax Return Transcript" or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript". You will need your Social Security Number, date of birth, and the address on file with the IRS. Adequate time from the date of filing your tax return (up to two weeks for IRS electronic filers, and up to eight weeks for paper IRS filers) is necessary prior to requesting an IRS tax return transcript. The IRS estimates allowing a minimum of 5 business days for your receipt of an available requested transcript.
- ☐ Check here if the student's IRS tax return transcript is attached to this worksheet
- ☐ Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

**INSTRUCTIONS:** Go to [www.fafsa.gov](http://www.fafsa.gov), log into the student's FAFSA record and select "Make FAFSA Corrections" and navigate to the Financial Information section of the form. From there, follow the instructions to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into the student's FAFSA.

**D. Parent's Income Information to be Verified - Check the Box that applies:**

- ☐ I, the parent(s), will not file and am not required to file a 2021 income tax return with the IRS.  
**IMPORTANT NOTE:** The parent(s) must **also complete** and return a 2023-2024 Student Non-Filer Form **AND** obtain an IRS Verification of Non-filing Letter by going to [www.irs.gov](http://www.irs.gov).
- ☐ I, the parent(s), have used the IRS Data Retrieval Tool in FAFSA on the web to retrieve and transfer 2021 IRS income information into the FAFSA, either on the initial FAFSA or when making corrections to the FAFSA. The student's school will use the IRS information that was transferred in the verification process.
- ☐ I, the parent(s), have not used the IRS Data Retrieval Tool in FAFSA on the web, but will use the tool to retrieve and transfer 2021 IRS income information onto the FAFSA. (See instructions below).
- ☐ I, the parent(s), am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the web and I will submit to the school a copy of my **2021 IRS Tax Return Transcript**. To obtain a free IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and order a "Tax Return Transcript" or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript". You will need your Social Security Number, date of birth, and the address on file with the IRS. Adequate time from the date of filing your tax return (up to two weeks for IRS electronic filers, and up to eight weeks for paper IRS filers) is necessary prior to requesting an IRS tax return transcript. The IRS estimates allowing a minimum of 5 business days for your receipt of an available requested transcript.
- ☐ Check here if the parent(s) IRS tax return transcript is attached to this worksheet
- ☐ Check here if the parent(s) IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

**INSTRUCTIONS:** Go to [www.fafsa.gov](http://www.fafsa.gov), log into the student's FAFSA record and select "Make FAFSA Corrections" and navigate to the Financial Information section of the form. From there, follow the instructions to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into the student's FAFSA.

Student's Name: \_\_\_\_\_ Last 4 Digits of Student's SSN: \_\_\_\_\_ page 4 of 4

### E. Identity Verification and Statement of Educational Purpose

As per federal regulation, Immaculata must receive documentation of your identity AND a signed Statement of Educational purpose for the 2023-2024 award year.

**Submit a copy of government-issued photo identification** (such as a driver's license, passport, or military ID); **AND**

**Submit a Statement of Educational Purpose** signed by the student and parent for the 2023-2024 award year.

#### Attach a copy of your government-issued photo identification

**NOTE: If you come to the Immaculata University Office of Financial Aid IN PERSON to show your original government-issued ID for us to copy AND while IN PERSON at our office, sign the Certification and Signature section below, then this worksheet DOES NOT need to be notarized. OTHERWISE, if you are unable to provide the aforementioned documentation IN PERSON, then the Certification and Signature section below MUST be notarized.**

#### Statement of Educational Purpose for the 2023-2024 Award Year

If you are the student, by signing the certification below, you certify that you (1) will use federal and/or state financial aid to pay the cost of attending an institution of higher education, (2) are not in default on a federal student loan or have made satisfactory arrangements to repay it, (3) do not owe money back on a federal student grant or have make satisfactory arrangements to repay it, (4) will notify Immaculata if you default on a federal student loan and (5) will not receive a Federal Pell Grant from more than one college for the same period of time. If you are the parent or the student, by signing the certification below, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide information that will verify the accuracy of your completed worksheet. This information may include U.S. or state income tax forms that you filed or are required to file. Also, you certify that you understand that **the Secretary of Education has the authority to verify information reported on your FAFSA with the Internal Revenue Service and other federal agencies.** If you sign any document related to the federal student aid programs electronically using a Federal Student Aid ID (FSA ID), you certify that you are the person identified by the FSA ID and have not disclosed that ID to anyone else. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

### F. Certification and Signature

Each person signing this worksheet certifies that all of the information reported on this worksheet is complete and correct. The student and one parent must sign and date.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Notary's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Notary Name (please print)

\_\_\_\_\_  
Notary Commission Ends

\_\_\_\_\_  
Immaculata F/Aid Staff Member Signature & Date (only if witnessing in-person signatures of student & Parent)

\_\_\_\_\_  
Immaculata F/Aid Staff Member Name & Title (if signed above, must also copy original ID's)