

V1 Standard

2023-2024 Verification Worksheet for Independent 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 Center 219, Immaculata PA 19345; Email: Finaid@immaculata.edu Fax: 484 395 0068.

A. Independent 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. Independent Student's Family Information

List below the people in your household. Include:

- Yourself
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2023 through June 30, 2024.
- Other people if they live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.
- Include the name of the college for any household member 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: _____ p. 2 of 2

C. Independent 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 **AND** obtain an IRS Verification of Non-filing Letter by going to www.irs.gov.
- ☐ I, the student have used the IRS Data Retrieval Tool in FAFSA on the web to retrieve and transfer 2021 IRS income information (and my spouse's) 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 (and my spouse's) 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 (and my spouse's) **2021 IRS Tax Return Transcript**. To obtain a free IRS tax return transcript, go to 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, 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. 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

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

Student's Signature

Date

Spouse's Signature (optional)

Date