

# WESTMINSTER COLLEGE

## 2023–2024 Verification Worksheet

### Dependent Student

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that, before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

#### A. Dependent Student's Information

**XXX-XX-**

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

#### B. Number of Household Members and Number in College

**1. Number of Household Members:** List below the people in your parent(s)' household. Include:

- Yourself, the student.
- Your parents (including a stepparent) even if you do not live with your parents.
- Your parents' other children if your parents will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards, even if they do not live with your parents.
- 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.
- Number in College: Please include in the column below the name of the college\* for any household member, excluding your parents, 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.

**List ALL household members below**

Full Name	Age	Relationship	College*	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>Westminster College</i>	

*If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

**Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.**

**C. Dependent Student's Income Information to Be Verified**

**1. TAX RETURN FILERS - STUDENT**

**Instructions:** Complete this section if the student, filed or will file a 2021 IRS income tax return. *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.*

**Check the box that applies:**

- ☐ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- ☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- ☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school a **2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return, applicable schedules and supporting W-2 forms.** *Please write the student's name and school ID number on the tax return transcript.*

*A 2021 IRS Tax Return Transcript may be obtained through:*

- Get Transcript by MAIL - Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
  - Get Transcript ONLINE - Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
  - Automated Telephone Request - 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
  - Paper Request Form - IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
- Check here if the student's 2021 IRS Tax Return Transcript or signed 2021 income tax return, applicable schedules and supporting W-2 forms is/are provided

- ☐ Check here if the student's 2021 IRS Tax Return Transcript or signed 2021 income tax return, applicable schedules and supporting W-2 forms will be provided to the student's school later. Verification cannot be completed until document(s) is/are submitted to the student's school.

**2. TAX RETURN NON-FILERS - STUDENT**

**Instructions:** Complete this section if the student will not file and is not required to file a 2021 income tax return with the

**IRS. Check the box that applies:**

- ☐ The student was not employed and had no income earned from work in 2021.
- ☐ The student was employed in 2021 and has listed below the names of all the student's employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 IRS W-2 forms issued to the student by their employers.] *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2021 Amount Earned	IRS W-2 Provided?
<i>Total Amount of Income Earned from Work</i>	<i>\$</i>	

**D. Parent's Income Information to Be Verified**

**1. TAX RETURN FILERS - PARENTS**

**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

**Instructions:** Complete this section if the student's parents filed or will file a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov). In most cases, no further documentation is needed to verify 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.*

**Check the box that applies:**

- ☐ The student's parents have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- ☐ The student's parents have not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- ☐ The student's parents are unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school a **2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return, applicable schedules and supporting W-2 forms. Please write the student's name and school ID number on the tax return transcript.**

***A 2021 IRS Tax Return Transcript may be obtained through:***

- Get Transcript by MAIL - Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript ONLINE - Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request - 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form - IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

**If the parents filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return, applicable schedules and supporting W-2 forms must be provided for each parent.**

*Check here if the student's parents' 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return, applicable schedules and supporting W-2 forms is/are provided.*

- ☐ *Check here if the student's parents' 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return, applicable schedules and W-2 forms will be provided to the student's school later. Verification cannot be completed until document(s) is/are submitted to the student's school.*

## 2. TAX RETURN NON-FILERS - PARENTS

**Instructions:** This section applies to each parent included in the household. Complete this section if the student's parents will not file and are not required to file a 2021 income tax return with the IRS.\*\*

Check the box that applies:

- ☐ Neither parent was employed, and neither had income earned from work in 2021.
- ☐ One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 IRS W-2 forms issued to the parents by their employers.] *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2021 Amount Earned	IRS W-2 Provided?
<i>Total Amount of Income Earned from Work**</i>	\$	

\*\*Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation. A **Verification of Non-filing** can be obtained from the IRS online or by using IRS Form 4506-T and checking box 7.

Check here if *Verification of Non-filing* or a signed statement is provided.

Check here if *Verification of Non-filing* or a signed statement will be provided later.

*Verification cannot be completed until all forms and documents have been submitted to the student's school.*

## E. Certification and Signatures

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

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.**

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's ID Number

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

***Do not mail this worksheet to the U.S. Department of Education.  
Submit this worksheet to the financial aid administrator at your school.  
You should make a copy of this worksheet for your records. If you have any questions, please call 724-946-7102.***

**PLEASE RETURN COMPLETED FORM AND REQUIRED DOCUMENTS TO:  
WESTMINSTER COLLEGE  
OFFICE OF FINANCIAL AID  
319 SOUTH MARKET STREET  
NEW WILMINGTON, PA 16172-0001**

*finaid@westminster.edu*