



\_\_\_\_\_  
Student Name

\_\_\_\_\_  
PC ID

## 2023-2024 Dependent Verification Worksheet (V1)

The 2023-2024 Free Application for Federal Student Aid (FAFSA) uses 2021 federal tax return financial information. The Department of Education randomly selects FAFSAs for a process called "Verification". This does not mean you completed the FAFSA incorrectly, but the Office of Financial Aid is required to verify accurate information.

**STUDENTS: By signing this form, you agree to the following terms. Please initial to acknowledge your agreement:**

1. \_\_\_\_\_ I give permission to the Financial Aid Office at Presbyterian College permission to update the information on my FAFSA.
2. \_\_\_\_\_ I understand financial aid could be adjusted pending the results.
3. \_\_\_\_\_ I understand that I need to follow all deadlines for enrollment while this form is being processed. This includes but is not limited to paying the balance on my invoice.
4. \_\_\_\_\_ I understand this form will not be processed until all signatures are submitted and all supporting documentation has been received.

The best person to contact in regards to this form is:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Phone or Email

### Student Information

\_\_\_\_\_  
Student First Name

\_\_\_\_\_  
Student Last Name

\_\_\_\_\_  
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### Household Information

**In the chart on page 2, include the following:**

- Yourself (the student).
- Your parent(s)/step-parent(s) (do not include non-custodial parent).
- Your parents' other children if: (a) The parents/step-parents will provide more than half of their support from July 1, 2023 - June 30, 2024. (b) The children would be required to provide parental information when applying for federal student aid.
- Other people if they now live with your parents/step-parents, and your parents/step-parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 - June 30, 2024.
- Write in the name of the college for any household member who will be attending at least half time between July 1, 2023 - June 30, 2024, and will be enrolled in a degree, diploma or certificate program.



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### Household Information Continued...

Full Name of Family Member	Relationship to Student	Age	Name of College Attending	Attending Full Time (at least 12 hours)
	Self		Presbyterian College	Y or N

### Student Tax Filing Status

**Important Note:** The instructions below apply to the **student** and spouse, if the student is married. Notify the financial aid office if the student and student’s spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Complete this section if the **student 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. In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

\_\_\_\_\_ The **student** has used the IRS DRT 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 DRT 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 DRT in FAFSA on the Web, and instead will provide the institution with a 2021 IRS Tax Return Transcript(s) (instructions on page 5) or a signed copy of the 2021 income tax return and applicable schedules.

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

\_\_\_\_\_ The **student** was not employed and had no income earned from work in 2021.

\_\_\_\_\_ The **student** was 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 or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form.

**Submit copies of all 2021 IRS W-2 forms issued to the student and/or spouse by their employers.**



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Employer's Name	IRS W-2 or an Equivalent Document provided?	Annual Amount Earned in 2021
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500
Total Amount of Income Earned From Work		\$

**Non-filers must:** 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 nonfiling from the IRS or other relevant tax authority and was unable to obtain the required documentation. See page 5 for instructions to obtain a free letter of nonfiling from the IRS.

Check here if confirmation of nonfiling or a signed statement is provided.

Check here if confirmation of nonfiling or a signed statement will be provided later.

### Parent Tax Filing Status

**Important Note:** The instructions below apply to each parent included in the household above. 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.

Complete this section if the **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. In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

The **parents have used** the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.

The **parents have not yet used** the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.

The **parents are unable or choose not to use** the IRS DRT in FAFSA on the Web, and instead will provide the institution with a 2021 IRS Tax Return Transcript(s) (instructions on page 5) or a signed copy of the 2021 income tax return and applicable schedules.

**PLEASE NOTE:** If the parents filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules must be provided for each.



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Complete this section if the **parents will not file and are not required to file a 2021** income tax return with the IRS.

\_\_\_\_ 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 or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form.

Submit copies of all 2021 IRS W-2 forms issued to the student and/or spouse by their employers.

Employer's Name	IRS W-2 or an Equivalent Document provided?	Annual Amount Earned in 2021
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500
Total Amount of Income Earned From Work		\$

**Non-filers must:** 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 nonfiling from the IRS or other relevant tax authority and was unable to obtain the required documentation. See page 5 for instructions to obtain a free letter of nonfiling from the IRS.

\_\_\_\_ Check here if confirmation of nonfiling or a signed statement is provided.

\_\_\_\_ Check here if confirmation of nonfiling or a signed statement will be provided later.

### Certifications and Signatures

Each person signing below certifies that all of the information reported 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, you may be fined, sent to prison, or both.

\_\_\_\_\_  
Student Signature and Date

\_\_\_\_\_  
Parent Signature and Date



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Student Name

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PC ID

## Ordering a Free 2021 IRS Tax Return Transcript

- **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. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or 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 student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules must be provided for each. \_\_\_\_ Check here if a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules is provided. \_\_\_\_ Check here if a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules will be provided later.

**Obtaining a Letter of Nonfiling** – Use the above instructions to request a 2021 Tax Return Transcript. If you did not file federal taxes for 2021, you will get a "Letter of Nonfiling" from the IRS.

Please MAIL this worksheet and all related documents to:

Presbyterian College  
ATTN: Office of Financial Aid  
503 S. Broad Street  
Clinton, SC 29325