



**2023-2024
Dependent
Verification Worksheet**
Requirement of the U.S Department of Education

Raider Connect
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Dayton, OH 45435-0001
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A. Student Information

| | | |
|----------------------------------|----------------------------|---|
| Last Name | First Name M.I. | University ID (UID) – (required) |
| _____ | _____ | U |
| Student Cell Phone Number | Parent Phone Number | <i>For assistance retrieving your UID Contact the Help Desk: 937-775-4827 or 1-888-775-4827</i> |
| Age: _____ | Last 4 of SSN: _____ | |

B. Parent(s) Household Information

▪ List name(s), age(s), SSN, etc. of parent(s) on the FAFSA who live in the household. **Include stepparent** if married to your biological or adoptive parent. Do not include a parent who does not live in the household due to separation or divorce.

| | First and Last Name <i>Parent(s)/Stepparent</i> | Age | Last 4 of SSN | Relationship to Student <i>Mother/Father/Stepparent</i> |
|-----------------|--|-------|---------------|--|
| Parent 1 | _____ | _____ | xxx-xx- | _____ |
| Parent 2 | _____ | _____ | xxx-xx- | _____ |

▪ List other children below for whom your parent(s) will provide more than half their support **July 1, 2023 - June 30, 2024**, even if they do not live with your parent(s). **Do not include children for whom your parent(s) pay child support.**

▪ List other people below who are not your parents' children - **only if** - they currently live with your parent(s) - **and** - your parent(s) provide more than half their support - **and** - will continue to provide more than half their support **July 1, 2023 - June 30, 2024.**

| First and Last Name <i>Other Household Members</i> | Age | Relationship <i>to Student</i> | College Name – <i>if attending at least ½ time during 7/1/23-6/30/24</i> | State <i>Location of college</i> |
|---|-----|-----------------------------------|--|-------------------------------------|
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| | | | | |

**If more space is needed, please attach a separate page.

C. Certification - We certify that all information entered is complete and correct.

Signatures cannot be typed.

| | | | |
|--------------------------|-------------|--|-------------|
| | / / | | / / |
| Student Signature | Date | Parent Signature (one required) | Date |

STUDENT NAME:

UID:

D. Tax Filing Information for 2021

| | | |
|---------------------------|---|---|
| Student 2021 Taxes | Student must complete this section | |
| | <input type="checkbox"/> Student filed a 2021 tax return <div style="border: 1px solid black; padding: 5px;"> <p>Provide one of these tax documents</p> <ul style="list-style-type: none"> ▪ Use the IRS Data Retrieval Tool on the 2023-2024 FAFSA ▪ Send a copy of the 2021 Federal IRS Tax Return Transcript ▪ Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1, 2, & 3, if filed with the tax return </div> | <p>Student did not file a 2021 tax return AND was not required to file</p> <p><input type="checkbox"/> Student <i>worked</i> in 2021 </p> <p><input type="checkbox"/> Student <i>did not work</i> in 2021</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small> </div> <p>Add 2021 employment information below - if no tax return filed</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> |

| | | |
|-----------------------------|--|--|
| Parent(s) 2021 Taxes | Parent(s) must complete this section | |
| | <input type="checkbox"/> Parent 1 filed a 2021 tax return <div style="border: 1px solid black; padding: 5px;"> <p>Provide one of these tax documents</p> <ul style="list-style-type: none"> ▪ Use the IRS Data Retrieval Tool on the 2023-2024 FAFSA ▪ Send a copy of the 2021 Federal IRS Tax Return Transcript ▪ Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1, 2, & 3, if filed with the tax return </div> | <p>Parent 1 did not file a 2021 tax return AND was not required to file</p> <p><input type="checkbox"/> Parent 1 <i>worked</i> in 2021 </p> <p><input type="checkbox"/> Parent 1 <i>did not work</i> in 2021</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small> </div> <p>Add 2021 employment information below - if no tax return filed</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> |

There is no other parent or stepparent in the household

| | | |
|-----------------------------|--|--|
| Parent(s) 2021 Taxes | <input type="checkbox"/> Parent 2 filed a 2021 tax return <div style="border: 1px solid black; padding: 5px;"> <p>Provide one of these tax documents</p> <ul style="list-style-type: none"> ▪ Use the IRS Data Retrieval Tool on the 2023-2024 FAFSA ▪ Send a copy of the 2021 Federal IRS Tax Return Transcript ▪ Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1, 2, & 3, if filed with the tax return </div> | <p>Parent 2 did not file a 2021 tax return AND was not required to file</p> <p><input type="checkbox"/> Parent 2 <i>worked</i> in 2021 </p> <p><input type="checkbox"/> Parent 2 <i>did not work</i> in 2021</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small> </div> <p>Add 2021 employment information below - if no tax return filed</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> |
|-----------------------------|--|--|

E. Untaxed Distributions - IRAs, Pensions, Annuities (2021 IRS Form 1040, Lines 4a and 5a minus Lines 4b and 5b)

| Student (If applicable) | Parent 1 (Both parents, if taxes filed jointly) | Parent 2 (If taxes filed separately) |
|---|---|---|
| <input type="checkbox"/> No IRA, Pension, Annuity Rollover | <input type="checkbox"/> No IRA, Pension, Annuity Rollover | <input type="checkbox"/> No IRA, Pension, Annuity Rollover |
| <input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover Amount \$ _____ | <input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover Amount \$ _____ | <input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover Amount \$ _____ |

Do_Not_Return these instructions with your form

Dependent Verification Guide for 2023-2024 Tips for Completing the Verification Worksheet

Verification is a process required by the U.S. Department of Education to confirm that information reported on the FAFSA is accurate. The U.S. Department of Education randomly selects students for this process. The Office of Financial Aid begins verifying FAFSA information after receiving all requested forms and documentation.

See the *Verification Worksheet* for the corresponding sections **B**, **D**, and **E** below.

B. Legal parent(s) for the FAFSA as defined by the U.S. Department of Education

Legal parent for the FAFSA includes biological parent(s), stepparent, and adoptive parents

For the FAFSA, grandparents, foster parents, legal guardians, legal custodians, brothers, sisters, aunts, uncles and widowed stepparents are not legal parents unless they have legally adopted the student.

| Marital Status of student's parent(s) | Information required by the U.S. Department of Education |
|---|--|
| Married | Both parents (includes biological, step-parent or legal adoptive parents) |
| Unmarried, but biological parents live together | Both biological parents |
| Remarried <i>previously divorced/widowed</i> | Legal parent and stepparent |
| Divorced or Separated | <p>Legal parent – <i>the parent whom the student lived with the most during the 12 months prior to completing the FAFSA.</i></p> <p>Students who lived equally with both parents need to provide information about the legal parent who provided the most financial support for the 12 months prior to completing the FAFSA.</p> <p>Students who do not live with a parent need to provide parent information for the parent who provided the most support the last time they lived with a parent.</p> |
| Widowed | Legal parent only (unless remarried) |
| Never married <i>to any person</i> | <p>Legal parent – <i>single parent never married to other biological parent or to any other person.</i></p> <p>Note: If parent has ever married, the “never married” status does not apply. The marital status in this case should be: married, remarried, widowed, divorced, or separated.</p> |

B. Household Members INCLUDE:

Parent(s) other children, even if they do not live with them – who will receive more than half their support from the student's parent(s) from July 1, 2023 - June 30, 2024. (*But do not include if paying child support for them.*)

NOTE: The FAFSA does not have the same dependency rules as the IRS. Contact RaiderConnect for assistance.

Parent(s) adult children who are not yet 24, not married, not a veteran, not active duty military, who do not live with the parent(s), but the adult child would be required to put parent(s) on the FAFSA if they were also completing it to attend college.

Other people - **only if** - they currently live with student's parent(s) - **and** - receive more than half their support from student's parent(s) - **and** - student's parent(s) will continue to provide more than half support from July 1, 2023 – June 30, 2024.

Does not include foster children for whom student's parent(s) receive a subsidy.

Does not include children whom student's parent(s) included in the child support paid figure on the FAFSA.

Support includes: housing, utilities, cell service, transportation, food, clothing, medical, childcare, personal

D. FAFSA requirements for Student and/or Parent(s) who filed a 2021 tax return

Provide official tax information → THREE OPTIONS:

- 1.) Use the ****IRS Data Retrieval Tool (DRT)** on the FAFSA to transfer tax information
- 2.) Obtain the ***IRS Tax Return Transcript** for 2021 and submit a copy to Raider Connect
- 3.) Submit copy of 2021 tax return, Form 1040, that was filed with the IRS
 - a.) Requires taxpayer signature or signature/credentials of tax professional who prepared the return
 - b.) Must also submit copies of Schedules 1, 2, and 3, if any of them were used for the tax return

Additional documentation required if student's/parent(s)' 2021 tax return has been amended.

An Amended Tax Return is when a taxpayer corrects their tax return by filing IRS Form 1040X, or when the IRS makes a correction to the taxpayer's tax return.

- Submit **signed and dated** copy of IRS Form 1040X if student/parent(s) corrected their 2021 tax return.
- Submit **2021 IRS Tax Account Transcript** if the IRS corrected the student's/parent(s)' 2021 tax return.

D. FAFSA requirements for Student and/or Parent(s) who did not file a 2021 Tax Return

Dependent students do not need to obtain a Non-Filing Letter from the IRS if no tax return filed for 2021

Parent(s) **must obtain/submit** a *Non-Filing Letter from the IRS if no tax return filed for 2021

Student and/or Parent(s) who earned money from work in 2021 but did not file a tax return

Sometimes wage earners do not earn enough to require them to file a tax return, or their income is not taxable.

For earnings from work → TWO STEPS:

- 1.) Must provide copies of all W-2s for 2021 (or the IRS Wage & Income Transcript)
- 2.) On the Verification Worksheet, list names of all employers and amounts earned for 2021

E. Untaxed Distributions from IRAs, Pensions, Annuities

Untaxed IRA Distributions,
Untaxed Pensions and Annuities

2021 IRS Tax Form 1040 (line 4a minus line 4b)
2021 IRS Tax Form 1040 (line 5a minus line 5b)

If student's and/or parent(s)' tax return(s) show a ROLLOVER for all or part of the untaxed amount (calculated above), check the box for IRA/Pension Rollover on the Verification Worksheet and add the rolled over amount to the worksheet.

RESOURCES

*IRS Tax Transcripts
Wage & Income Transcript
Verification of Non-Filing

Order the Tax Return Transcript, Tax Account Transcript, IRS Verification of Non-Filing, and Wage and Income Transcript for W-2s
<https://www.irs.gov/individuals/get-transcript>

**IRS Data Retrieval Tool (DRT)

To use the IRS Data Retrieval Tool at a later time, login to the FAFSA and select **MAKE A FAFSA CORRECTION**. Navigate to the student and/or parent financial section(s). Upon being successful with transferring the tax information into the FAFSA, **sign it with FSA ID(s) and submit**.

Wings Express

Track verification status on student's WINGS Express.
Student will be contacted if more information is needed.

For deadline and processing timeframes, see <https://www.wright.edu/raiderconnect/financial-aid/important-dates>