



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

Raider Connect
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A. Student Information

Last Name	First Name M.I.	University ID (UID) – (required)
_____	_____	U
Student Cell Phone Number	Other 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. Student/Spouse Household Information

- List name(s), age(s), SSN, etc. of spouse, if married.

	First and Last Name	Age	Last 4 of SSN	College name – if attending at least ½ time from 7/1/23-6/30/24	State Location of college
Spouse			xxx-xx-		

- List children of student/spouse for whom student/spouse, if married, will provide more than half their support **July 1, 2023 - June 30, 2024**, even if they do not live with them. **Do not include children for whom student/spouse pay child support.**
- List other people below who are not your children - **only if** - they currently live with you - **and** - you 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 to Student	College Name – if attending at least ½ time during 7/1/23-6/30/24	State Location of college

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

C. Certification – I (we) certify that all information entered is complete and correct.

Signature(s) cannot be typed.

/ /	/ /
Student Signature	Spouse Signature (optional)
Date	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 gray; 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> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <input type="checkbox"/> Student <i>worked</i> in 2021 </div> <div style="border: 1px solid gray; padding: 5px; width: 35%;"> <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small> </div> </div> <p><input type="checkbox"/> Student <i>did not work</i> in 2021</p> <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>

Spouse 2021 Taxes	Spouse must complete this section	
	<input type="checkbox"/> There is no spouse in the household	
<input type="checkbox"/> Spouse filed a 2021 tax return <div style="border: 1px solid gray; 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>Spouse did not file a 2021 tax return AND was not required to file</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <input type="checkbox"/> Spouse <i>worked</i> in 2021 </div> <div style="border: 1px solid gray; padding: 5px; width: 35%;"> <input type="checkbox"/> W-2s attached <small>REQUIRED IF TAX RETURN NOT FILED</small> </div> </div> <p><input type="checkbox"/> Spouse <i>did not work</i> in 2021</p> <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 <small>(Both student & spouse, if taxed filed jointly)</small>	Spouse <small>(if taxes filed separately)</small>	
<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 \$ _____	

Do_Not_Return these instructions with your form

Independent 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. Household Members INCLUDE:

Student's/spouse's children, even if they do not live with them – who will receive more than half their support from student/spouse 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.

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

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

Does not include foster children for whom student/spouse receive a subsidy.

Does not include children whom student/spouse 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 Spouse 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/spouse'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/spouse corrected their 2021 tax return.
- Submit **2021 IRS Tax Account Transcript** if the IRS corrected the student's/spouse's 2021 tax return.

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

Student/spouse **must obtain/submit** a *Non-Filing Letter from the IRS if no tax return filed for 2021

Student/spouse 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

Do_Not_Return these instructions with your form

E. Untaxed Distributions from IRAs, Pensions, Annuities

<u>Untaxed</u> IRA Distributions, <u>Untaxed</u> Pensions and Annuities	2021 IRS Tax Form 1040 (line 4a <u>minus</u> line 4b) 2021 IRS Tax Form 1040 (line 5a <u>minus</u> line 5b)
If student's and/or spouse's tax return(s) show a <u>ROLLOVER</u> 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 financial section. Upon being successful with transferring the tax information into the FAFSA, sign it with your FSA ID 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	