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Student ID number

**\*\*\*All pages need to include the students name and ID number\*\*\***

### Section A

- Please make sure that all information is complete and accurate.

### Section B

- This section will consist of your household information, which will differ depending on whether you are a dependent student or independent student. To help you figure which you are please see below:
  - To qualify as an **Independent Student**, you will need to be able to answer yes to one of the following:
    - You are 24 years of age
    - You have dependents that you provide at least 50% or more of their financial support
    - You are married as of the date you filed the FAFSA
    - Currently ward of the court or used to be until age 18
    - Veteran or active-duty member of the U.S. Armed Forces
    - Post-baccalaureate student
  - If you **could not** answer yes to any of the above questions you are a **Dependent Student**.
  - Dependent Student Household includes:**
    - Student
    - Parents/stepparents
    - Siblings, as long as your parents provide more than half of their financial support
    - Any other individual that lives in the household that receives more than half of their financial support from your parents.
    - If parents are divorced, only include the parent that you live with/provides 50% or more of your financial support
  - Independent Student Household includes:**
    - Student
    - Spouse (if married)
    - Dependents that the student provides 50% or more of financial support
    - Any other individual that lives in the household that receives more than half of their financial support from the student

### Section C

- This section will be clarifying how you will and/or have provided your tax and income information to the school.

### Section D

- This section will be clarifying how your parents (if you are a dependent student) will and/or have provided their tax and income information to the school.

### Section E

- E-1** This information needs to **only** be provided if you selected that you did work but were not required to file taxes.
  - If you are completing this section, you are required to include all W2's from 2020.**
- E-2** Verification of type of tax return filed.
- E-3** Verification of Assets.



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## 2022-2023 V1 Verification Worksheet

The Department of Education has selected your FAFSA for a review process called *verification*. In this process, the financial aid office will be verifying information from your FAFSA with this worksheet and your tax and income information from the IRS. Federal regulations require colleges to ask for this information before disbursing federal aid. If there are differences between your application and the documents you provide, your FAFSA information will need to be corrected by your Financial Aid Administrator. *This could result in a change of your federal aid eligibility and your current financial aid package.*

***Please read all instructions carefully before completing this form to avoid delaying your financial aid awards.***

### SECTION A: STUDENT INFORMATION

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Last name	First Name	Date of Birth
Address (include apt. #)		Email Address
City	State	Zip
Phone Number (including Area code)		

### SECTION B: FAMILY INFORMATION

See instructions on **page 1** on how to complete this section properly.  
***Make sure to fill in all blocks of information for each person in the household.***

FULL NAME	AGE	RELATIONSHIP (to student)	COLLEGE NAME (if currently enrolled) <b>*parents college are not to be included*</b>	WILL BE ENROLLED in at least in 6 credit hours (yes or no)
1.		Self (student)	Bluefield University	
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				



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**SECTION C: STUDENT/SPOUSE (IF MARRIED) INCOME INFORMATION** (all applicants)

CHECK **ONE** APPROPRIATE BOX BELOW:

- Check here if the student filed taxes in 2020 and used the IRS DATA Retrieval Tool when FAFSA was completed.
- Check here if the student filed taxes in 2020 but did not to use the IRS Data Retrieval Tool when FAFSA was completed. You are required to provide a copy of your **2020 IRS TAX RETURN TRANSCRIPT OR A SIGNED COPY OF THE 2020 INCOME TAX RETURN AND APPLICABLE SCHEDULES**. A copy of your **2020 IRS Tax Return Transcript** may be requested from the IRS by ordering online at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946. (**\*instructions on page 5**)
- Check here if the student did not file and was not required to file taxes in 2020. If you did not file taxes in 2020, please complete the student portion of **SECTION E-1: INCOME CERTIFICATION** on the next page. If the student was employed anytime in 2020, attach a copy of the all **2020 W2 forms** even if the student was not required to file taxes in 2020.

**SECTION D: PARENT’S INCOME INFORMATION** (for DEPENDENT students only)

CHECK **ONE** APPROPRIATE BOX BELOW:

- Check here if the parent(s) filed taxes in 2020 and used the IRS DATA Retrieval Tool when FAFSA was completed.
- Check here if the parent (s) filed taxes in 2020 but did not to use the IRS Data Retrieval Tool when FAFSA was completed. You are required to provide a copy of your **2020 IRS TAX RETURN TRANSCRIPT OR A SIGNED COPY OF THE 2020 INCOME TAX RETURN AND APPLICABLE SCHEDULES**. A copy of your **2020 IRS Tax Return Transcript** may be requested from the IRS by ordering online at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946. (**\*instructions on page 5**)
- Check here if the parent(s) did not file and was not required to file taxes in 2020. If you did not file taxes in 2020, please complete the student portion of **SECTION E-1: INCOME CERTIFICATION** on the next page. If the parent was employed anytime in 2020, attach a copy of the all **2020 W2 forms** even if the parent was not required to file taxes in 2020.

**SECTION E-1: INCOME CERTIFICATION**

**\*SKIP IF YOU FILED TAXES IN 2020\***

**E-1: NON TAX FILERS:** If you/your spouse/your parent(s) had any income but did not file an IRS Tax Return, you must list your income below and **attach ALL W2 forms** as supporting documentation and list your income below. You must also report any earned income paid in cash. If independent student or parent, you must include a letter of non-tax filing from the IRS to accompany this form.

- Check here if the student did not work in 2020.
- Check here if the parent did not work 2020.

	Employers/Sources of Income	Total income amount in 2020
<b>Student’s Income</b>		
<b>Spouse’s Income</b> (if married)		
<b>Parent’s Income</b> (if dependent)		



## IRS Tax Return Transcript Information:

**\*\*\*If the transcript is for a parent, please include the names listed on the tax return\*\*\***

A **2020 IRS Tax Return Transcript** may be obtained through:

- **Online Request** – Go to [www.irs.gov](http://www.irs.gov). Under the Tools heading on the IRS homepage, click on the “Get a tax transcript” option. You can choose between two options:
  - Get Transcript by Mail- transcripts arrive in 5 to 10 calendar days at the address on file
  - Get Transcript ONLINE – requires creation of an account with personal identifiers
- **Telephone Request** – 1-800-908-9946
- **Paper Request form** – IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2020 IRS income tax return information is available for the IRS Data Retrieval Tool or the IRS Tax Return Transcript within 2–3 weeks after the 2020 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2020 paper IRS income tax returns, the 2020 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2020 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

**\*\*Students can submit a FAFSA correction to use the IRS DRT if completed in a timely manner\*\***

If the parents filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s)** must be provided for each.

**\*\* Verification of 2020 Income Information for Individuals with Unusual Circumstances \*\***

### **Individuals Who Filed an Amended IRS Income Tax Return**

An individual who filed an amended IRS income tax return for tax year 2020 must provide:

- The signed copy of IRS Form 1040X that was filed with the IRS; **and either of the following**
- A signed or unsigned IRS Tax Return Transcript containing information from the original tax return filed with the IRS or any other IRS tax transcript containing all income and tax information from the original tax return that is subject to verification;
- A signed copy of the tax return that was filed with the IRS or relevant tax authority; **or**
- Unchanged IRS DRT data on the Institutional Student Information record (ISIR).

### **Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

**\*If you are a victim of IRS tax-related identity theft, be sure to contact the IRS Identity Protection Specialized Unit at 800-908-4490.**

### **Individuals Who Filed Non-IRS Income Tax Returns**

An individual who filed or will file a 2020 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer’s income and tax information required to be verified for tax year 2020; or
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2020 income tax return(s).



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Student ID number

## IRS Tax Return Transcript Information:

### Extension Filers

An individual who is required to file a 2020 IRS income tax return but have not filed because they have been granted a filing extension by the IRS beyond the automatic six-month extension for the 2020 tax year. These individuals must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for the tax year 2020
- Verification of nonfiling from the IRS dated on or after October 1, 2020; received or an equivalent document; and
- If self-employed, a signed statement certifying the amount of AGI and U.S. income tax paid for tax year 2020