

## V5 Verification Worksheet Instructions

**\*\*\*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 2022.**
- E-2** Verification of type of tax return filed.
- E-3** Verification of Assets.

### Section G

- In this section students will need to mark which form of documentation.

### Section H

- Students will need to sign and have notary confirm signature before document is submitted.
- Please make sure to provide a copy of your driver's license



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Student ID number

## 2024-2025 V5 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

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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Student ID number

**SECTION C: STUDENT/SPOUSE (IF MARRIED) INCOME INFORMATION** (all applicants)CHECK ONE APPROPRIATE BOX BELOW:

- ☐ Check here if the student filed taxes in 2022 and used the IRS DATA Retrieval Tool when FAFSA was completed.
- ☐ Check here if the student filed taxes in 2022 but did not to use the IRS Data Retrieval Tool when FAFSA was completed. You are required to provide a copy of your **2022 IRS TAX RETURN TRANSCRIPT OR A SIGNED COPY OF THE 2022 INCOME TAX RETURN AND APPLICABLE SCHEDULES**. A copy of your **2022 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 2022. If you did not file taxes in 2022, please complete the student portion of **SECTION E-1: INCOME CERTIFICATION** on the next page. If the student was employed anytime in 2022, attach a copy of the all **2022 W2 forms** even if the student was not required to file taxes in 2022.

**SECTION D: PARENT'S INCOME INFORMATION** (for DEPENDENT students only)CHECK ONE APPROPRIATE BOX BELOW:

- ☐ Check here if the parent(s) filed taxes in 2022 and used the IRS DATA Retrieval Tool when FAFSA was completed.
- ☐ Check here if the parent (s) filed taxes in 2022 but did not to use the IRS Data Retrieval Tool when FAFSA was completed. You are required to provide a copy of your **2022 IRS TAX RETURN TRANSCRIPT OR A SIGNED COPY OF THE 2022 INCOME TAX RETURN AND APPLICABLE SCHEDULES**. A copy of your **2022 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 2022. If you did not file taxes in 2022, please complete the student portion of **SECTION E-1: INCOME CERTIFICATION** on the next page. If the parent was employed anytime in 2022, attach a copy of the all **2022 W2 forms** even if the parent was not required to file taxes in 2022.

**SECTION E-1: INCOME CERTIFICATION****\*SKIP IF YOU FILED TAXES IN 2022\***

**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 2022.
- ☐ Check here if the parent did not work 2022.

	Employers/Sources of Income	Total income amount in 2022
Student's Income		
Spouse's Income (if married)		
Parent's Income (if dependent)		

### E-2: Tax Return Verification

**Student: Please indicate the tax return type filed in 2022 below.**

- ☐ Check here if you filed a 1040
- ☐ Did not file taxes in 2022

**Parent: Please indicate the tax return type filed in 2022 below.**

- ☐ Check here if you filed a 1040
- ☐ Did not file taxes in 2022

### E-3: Asset Verification

If you, or your parent, filed a 1040, please provide the information as of the date you filed your Free Application for Federal Student Aid (FAFSA). If you were required to provide parental information on your FAFSA you must complete both the parent and student sections. If you were married when you filed the FAFSA, include you and your spouse's information. Complete and return to the Bluefield College BC Central Office as soon as possible. Additional information or documentation may be requested.

Student/Spouse (if married) Asset Amount If the answer is zero enter "0"	Asset Type	Parent(s) Asset Amount (dependent students) If the answer is zero enter "0"
\$	<b>Cash, Savings and Checking Accounts</b>	\$
\$	<b>Net worth of investment value, including real estate</b> Trust funds, money market funds, mutual funds Certificates of deposit Stocks, stock options, bonds and other securities Qualified educational benefits or education savings accounts (529 college savings plans and the refund value of 529 prepaid tuition) <b>Note:</b> Do NOT include the home you live in, retirement 401(k) plans, pension funds, annuities, or non-education IRAs.	\$
\$	<b>Net Worth of Business and/or Investment Farm Value</b> Market value of land, buildings, machinery, equipment, inventory  <b>Note:</b> Do NOT include the value of a small business if it has 100 or fewer full-time employees.  Do NOT include the value of a family farm that you, your spouse and/or your parents live on and operate.	\$

### SECTION F: SIGN THIS WORKSHEET

By signing this form, I/we certify that all the information reported is complete and correct. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

## Section G: Identity & Statement of Educational Purpose

Please complete one of the following options below based on your convenience:

**1.** The student must appear in person at Bluefield University to verify his or her identity by presenting valid government-issued photo identification (ID), such as, but not limited to, a driver's license, or other state-issued ID, or passport. **The institution will maintain a copy of the student's photo ID** that is annotated with the date it was received and reviewed including the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, in the presence of the institutional official, the following:

### STATEMENT OF EDUCATIONAL PURPOSE

I certify that I (print name) \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I receive will only be used for educational purposes and to pay the cost of attending Bluefield University for 2023-2024.

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

Authorized BC Official \_\_\_\_\_ Date \_\_\_\_\_

**2.** If the student is unable to appear in person at Bluefield University to verify his or her identity, the student must provide:

- A. A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- B. The **original** notarized Statement of Educational Purpose provided below.

### STATEMENT OF EDUCATIONAL PURPOSE

I certify that I (printed name) \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Bluefield University for 2023-2024.

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

### NOTARY'S CERTIFICATE OF ACKNOWLEDGMENT

State of \_\_\_\_\_ city/county of \_\_\_\_\_ on \_\_\_\_\_, \_\_\_\_\_

Date

before me, \_\_\_\_\_ personally appeared,  
Notary's Name  
\_\_\_\_\_, and provided to me on basis of satisfactory  
Printed Name of Signer  
evidence of identification \_\_\_\_\_ to be the above-  
Type of government-issued photo ID provided  
named person who signed the foregoing instrument.

Seal

### WITNESS my hand and official seal

\_\_\_\_\_  
Notary's Signature  
My commission expires on \_\_\_\_\_  
Date

## IRS Tax Return Transcript Information:

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

A **2022 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, 2022 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 2022 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2022 paper IRS income tax returns, the 2022 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2022 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 2022 IRS income tax returns, the IRS DRT cannot be used and the **2022 IRS Tax Return Transcript(s)** must be provided for each.

**\*\* Verification of 2022 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 2022 must provide a signed copy of the 2022 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

### **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**

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information



on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

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Student ID number

## IRS Tax Return Transcript Information:

### Extension Filers

An individual who is required to file a 2022 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022, must provide:

- A signed statement listing the sources of any 2022 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2022; and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2022.