Standard Verification Worksheet (V1) 2022-2023

Your application for financial aid was selected for verification. Verification is a process mandated by the U.S. Department of Education, which requires Franciscan University to compare information from your FAFSA application with this worksheet and your financial documents, and to request additional information if necessary. If there are discrepancies between your application and your financial documents, corrections to your FAFSA may be required.

Section 1. Student Information

_____   _____
Student's Full Name   Student ID #

_____
Permanent Address   City   State   ZIP Code

_____   _____   _____
Date of Birth   Phone Number (Mobile)   e-mail address

Section 2. 2020 Federal Tax Filing Status

In order to make changes to your FAFSA and/or verify the tax information reported on your FAFSA, the Department of Education requires that we review your tax record for the year in question, as supplied directly by the IRS. **The easiest way to supply this information is to use the IRS Data Retrieval Tool when you fill out the FAFSA.** Even if you have already completed the FAFSA without the Retrieval Tool, you can still make amendments to the FAFSA by linking information using the Retrieval Tool. If you were ineligible or unable to use the Retrieval Tool, you will need to order a Tax Return Transcript directly from the IRS, using the instructions on page 2. Please make sure to order it sent directly to you, NOT to Franciscan University. Then mail or scan and email us the Tax Return Transcript, along with the student's name and student ID number for timeliest processing. **PLEASE NOTE: We cannot accept copies of a 1040.**

2a. Dependent Students

*PLEASE NOTE: For financial aid purposes, a dependent student is a student who is NOT one of the following: at least 24 years old, married, a graduate or professional student, a veteran, a member of the armed forces, an orphan, a ward of the court, someone with legal dependents other than a spouse, an emancipated minor or someone who is homeless or at risk of becoming homeless. **If you meet one of those requirements, please skip ahead and fill out section 2b instead. If you are a dependent student, fill out section 2a instead of section 2b.**

Student Filing Status
Check one of the following:
☐ I used the IRS Data Retrieval Tool on the FAFSA and did not change the information
☐ I am attaching my 2020 IRS Tax Return Transcript
☐ I filed an amended 2020 Tax Return. If you select this option, you must submit a Tax Account Transcript and a Tax Return Transcript
☐ I will not file and am not required to file a 2020 U.S. Income Tax Return **(NOTE: you must submit copies of all 2020 W2's)**
☐ I did not file a 2020 Tax Return and did not have earnings in 2020

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Parent(s) Filing Status
Check one of the following: ☐ My parent(s) used the IRS Data Retrieval Tool on the FAFSA and did not change the information   ☐ My parent(s) are attaching their 2020 IRS Tax Return Transcript   ☐ My parent(s) filed an amended 2020 Tax Return. If you select this option, they must submit a Tax Account Transcript and a Tax Return Transcript   ☐ My Parent(s) will not file and are not required to file a 2020 U.S. Income Tax Return **(NOTE: you must submit copies of all 2020 W2's and submit the verification of income form, available through the documents section of your MyFranciscan account)**   ☐ My parent(s) did not file a 2020 Tax Return and did not have earnings in 2020 **(NOTE: You must also submit the verification of income form, available through the documents section of your MyFranciscan)**

2b. Independent Students

*PLEASE NOTE: Only fill out this section if you meet the requirements for an independent student listed above section 2a. If you do not meet the requirements, you should fill out 2a instead.

Student (& Spouse) Filing Status
Check one of the following: ☐ I used the IRS Data Retrieval Tool on the FAFSA and did not change the information   ☐ I am attaching my 2020 IRS Tax Return Transcript   ☐ I filed an amended 2020 Tax Return. If you select this option, you must submit a Tax Account Transcript and a Tax Return Transcript   ☐ I will not file and am not required to file a 2020 U.S. Income Tax Return **(NOTE: you must submit copies of all 2020 W2's) and submit the verification of income form (available through the documents section of your MyFranciscan account)**   ☐ I did not file a 2020 Tax Return and did not have earnings in 2020 **(NOTE: You must also submit the verification of income form, available through the documents section of your MyFranciscan)**

Ordering a Federal Tax Return Transcript via IRS.GOV

1. Go to www.IRS.gov and click on the "Order a Return or Account Transcript" link. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript."
2. You will need to provide your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the IRS tax return was filed). [**Please note:** *To order a printed copy of your transcript, only these first two steps are necessary. To order an electronic copy of your transcript, step three is also required.*]
3. You will also need to answer a series of identity-confirming questions. This may include providing a credit card number (although you will not be asked to pay anything), a mortgage number, loan account number, etc. Usually the IRS income information will be available immediately; however, it can take up to two weeks for it to come available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

Ordering a Federal Tax Return Transcript via Phone Interface

1. Call 800-908-9946. This will connect you to an automatic system to request your transcript.
2. Press 1 to continue in English, or 2 to continue in Spanish.
3. Follow the prompts to provide your social security number and the street address you filed your taxes under.
4. Choose option 2 on the following menu.
5. Enter the tax year you would like a transcript for.
6. Wait 5 to 10 days for the transcript to arrive by mail.

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Section 3. Household Information

*PLEASE NOTE: Your reporting in this section will vary depending on your dependency status. A student may or may not be considered independent if they are not supported financially by their parents – there are other conditions that must be met to claim independent status. If you are unsure whether you are dependent or independent, please review the criteria in section 2 above.

Dependent Students (if you filled out section 2a): Carefully read the following instructions, and in the table below, report:
- Yourself
- Your parents, including step-parents, even if you do not live with your parents. Do not include your non-custodial parent
- Your parent(s)' other dependent children if; your parent(s) will provide more than half of their support from July 1, 2022 through June 30, 2023 or if the other children would be required to provide parental information if they were completing a FAFSA for 2022-2023. Include children who meet either of these standards even if the children do not live with the parents
- Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2022 through June 30, 2023
- Provide college information for those students attending at least half-time during 2022-2023 in a program leading to a degree, diploma, or certificate

Independent Students (if you filled out section 2b): Carefully read the following instructions, and in the table below, report:
- Yourself
- Your spouse (if you are married)
- Your children if you will provide more than half of their support from July 1, 2022 through June 30, 2023
- Other people only if they live with you and you or your spouse provide more than half of their support and will continue to do so from July 1, 2022 through June 30, 2023. Provide college information for those students attending at least half-time during 2022-23 in a program leading to a degree, diploma, or certificate

*PLEASE NOTE: If more space is needed, attach a separate sheet.

Full Name	Age	Relationship to Student	College Name/Grade Level

Section 4. Signatures (Required for All)

I affirm that all information reported on this form and any attachment hereto is true, complete, and accurate to the best of my knowledge. I understand that if I purposely give false or misleading information in order to obtain federal funds, I may be subject to a $10,000 fine, prison sentence, or both.

_____   _____
Student   Date

_____   _____
Parent (if dependent)   Date

*DO NOT submit this document to the U.S. Department of education. Return it to the Financial Aid Office at Franciscan University.