

2022-2023 INDEPENDENT VERIFICATION WORKSHEET

Student Name: _____ **Student ID#** _____

Email: _____ **Home/Cell Phone** _____

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. This process is mandated by the US Department of Education, requiring schools to verify the data provided on the FAFSA to ensure its accuracy. We must ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this worksheet and with any other required document(s). If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet and submit it to the Financial Aid Office.

NOTE: *Additional documentation may be requested for clarification.*

A. Student's Household Information

List below the people in your household. **Include:**

- Yourself.
- Your spouse, if you are married.
- Your and/or your spouse's children, if any, if you will provide more than half of their support from July 1, 2022, through June 30, 2023, or if the child would be required to provide your information if they were completing a FAFSA for 2022-2024. Include children who meet either of these standards, even if they do not live with you.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2023.

Include the name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2022, and June 30, 2023. *If more space is needed, attach a separate page with your name and Student ID# at the top.*

| FULL NAME | AGE | RELATIONSHIP | COLLEGE | ENROLLED AT LEAST HALF TIME? |
|-----------------------------|-----------|--------------|---------------------------|------------------------------|
| <i>Marty Jones(example)</i> | <i>28</i> | <i>Wife</i> | <i>Central University</i> | <i>Yes</i> |
| | | <i>Self</i> | | |
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B. Income Tax Information

Check ONE box that applies to you, and ONE box that applies to your spouse (if applicable).

| STUDENT | SPOUSE |
|--|---|
| <input type="checkbox"/> I filed a 2020 Federal Tax Return. Did you use the IRS Data Retrieval Tool to transfer your tax data directly from the IRS to the FAFSA? <input type="checkbox"/> Yes <input type="checkbox"/> No: Update your FAFSA and use the IRS Data Retrieval Tool *OR submit a copy of your IRS Tax Return Transcript** <i>(See information below)</i> | <input type="checkbox"/> I filed a 2020 Federal Tax Return. Did you use the IRS Data Retrieval Tool to transfer your tax data directly from the IRS to the FAFSA? <input type="checkbox"/> Yes <input type="checkbox"/> No: Update your FAFSA and use the IRS Data Retrieval Tool *OR submit a copy of your IRS Tax Return Transcript** <i>(See information below)</i> |
| <input type="checkbox"/> I did NOT file a 2020 Federal Tax Return BUT did earn income in 2020 ; however I was not required to file taxes. List the employer and amount earned for 2020: Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ | <input type="checkbox"/> I did NOT file a 2020 Federal Tax Return BUT did earn income in 2020 ; however I was not required to file taxes. List the employer and amount earned for 2020: Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ Employer: _____ Earned: \$ _____ |
| <input type="checkbox"/> I was NOT employed and had NO INCOME earned from work in 2020. | <input type="checkbox"/> I was NOT employed and had NO INCOME earned from work in 2020. |
| <p>* IRS Data Retrieval Tool</p> <ul style="list-style-type: none"> • Make a correction to your FAFSA online and access the tool within the financial information section. • Don't forget to sign and submit the FAFSA correction. • Allows on-line FAFSA filers to pull their tax data directly from the IRS to auto-fill the tax portion of the FAFSA. • Quickest way to get accurate tax information to the Financial Aid Office. | |
| <p>** How to Obtain an IRS Tax Return Transcript From the IRS</p> <p>Be sure to request a Tax Return Transcript. We cannot accept a Tax Account Transcript or copies of your 1040, 1040A or 1040EZ.</p> <ul style="list-style-type: none"> • Online request at https://www.irs.gov/individuals/get-transcript • Automated Telephone Request: 1-800-908-9946. • Paper Request: IRS Form 4506T – Must be used if you have moved since filing your taxes. Can be downloaded at www.irs.gov, or obtained from the Financial Aid Office. • Visit your local IRS Office. | |

C. Submit Copies of W-2's:

Copies of all your and your spouse's **W-2's** for income earned from work for 2020 are required to be submitted to the Financial Aid Office. Please attach copies to this form.

- If you have lost any W-2's, you may order a **Wage and Income Transcript** from the IRS to satisfy the requirement. You can obtain this Transcript the same way that you request a Tax Return Transcript.

Signatures

Each person signing below certifies that all of the information reported is complete and correct.

STUDENT SIGNATURE: _____ **DATE:** _____

SPOUSE SIGNATURE: _____ **DATE:** _____

(If applicable)

WARNING: If you purposely give false or misleading information in an attempt to obtain federal financial aid, you may be fined up to \$20,000 and/or incarcerated.

All forms & documentation should be submitted to the Financial Aid Office at Catawba College, 2300 West Innes Street Salisbury, NC 28144 or Faxed to (704) 637-4252. Or to securely upload documents, log into your CatLink Account and use the **Financial Aid Document Upload** under the Financial Aid Section on the Money Tab. Due to Federal Regulations, no personally identifiable (Tax Return Transcripts and W2 information) can be scanned to email.