



2023-2024 Dependent Verification Worksheet

WHAT IS VERIFICATION?

Your application for financial aid was selected for review in a process called "verification." In this process, the Financial Aid Office is required to collect information from you and compare it to the information that you submitted on your Free Application for Federal Student Aid (FAFSA). If we find that any of the items are incorrect, we must make those corrections to your FAFSA. If the corrections result in a change to your financial aid award, we will send you a revised offer letter within two weeks of completing the verification.

Submit this completed and signed form to the Financial Aid Office with the required documentation (see Sections C & D) within 14 days. **Your financial aid will not be processed until this form has been fully completed and submitted with all required documentation.**

WHAT ARE THE STEPS?

1. Complete the IRS Data Retrieval by navigating to the Financial Information section of the FAFSA. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information directly into your FAFSA.
2. If you cannot complete Step 1, you may order a **2021 IRS Tax Return Transcript** from the IRS online at www.irs.gov, select "Get Your Tax Record". You can also obtain one by phone at 1-800-908-9946. Obtain a **2021 IRS Tax Return Transcript** for yourself and for your parents/step-parent. **Please make certain you request a tax return transcript – NOT a tax account transcript.** You may also submit a **signed** copy of the 2021 IRS Federal Income Tax return and applicable schedules. If your parent(s) did not file taxes for 2021, each parent/step-parent must request a **2021 IRS Verification of Non-Filing Letter**.
3. Fill in and sign this worksheet – you and at least one parent must physically sign the form.
4. Review all letters from the Financial Aid Office to see if you need to submit other documentation.
5. After a financial aid counselor reviews your information, you may be asked to submit additional documentation. You will be notified about your financial aid awards after all the information has been reviewed and any necessary corrections made.
6. If you filed an amended return, or were a victim of tax-related identity theft, please contact our office for more information.

A. STUDENT INFORMATION

PLEASE PRINT

STUDENT'S NAME: _____

HOLY FAMILY ID: _____

ADDRESS: _____
STREET ADDRESS CITY STATE ZIP

DAYTIME PHONE: _____ EVENING PHONE: _____

B. FAMILY INFORMATION

List the people in your parents' household whom your parents will support between July 1, 2023 and June 30, 2024. INCLUDE: yourself (even if you do not live with your parents); your parents/stepparents; your parents' other children who will receive more than half of their support from your parents or if they would be required to provide parental information when applying for federal financial aid; other people living with your parents and receiving more than half of their support from your parents. Do not include foster children. Attach an additional sheet if necessary.

| Name | Date of Birth | Relationship to Student | College attended (please list the full name) at least half-time in a degree or certificate program during the 23/24 academic year (excluding parents). Please list if it is an undergraduate (UG) or graduate (GR) program. |
|------|---------------|-------------------------|---|
| You: | | Self | Holy Family University - UG |
| | | | |
| | | | |
| | | | |
| | | | |

C. STUDENT INCOME INFORMATION

Check the appropriate box below and provide the requested information and documents (you should only check one):

- I used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2021 IRS income tax information into my FAFSA and made no further changes to the information. *(The school will use the IRS information that was transferred in the verification process.)*
- I did not (or could not) transfer my 2021 IRS income information to the FAFSA using the IRS Data Retrieval Tool in FAFSA on the Web. Attached is a copy of my **2021 IRS Tax Return Transcript** or a **signed** copy of the 2021 IRS Federal Income Tax return and applicable schedules. Please see the first page for instructions on how to obtain your 2021 IRS Tax Return Transcript.
- I was not employed and had no income earned from work in 2021 and did not and am not required to file a 2021 IRS income tax return.
- I was employed in 2021 but did not and am not required to file a 2021 IRS income tax return. I have listed below the names of all my employers and the amount earned from each employer in 2021. (Please attach copies of all 2021 IRS W-2 forms issued by each employer.) Attach an additional sheet if necessary. **** Do not check this box if you filed a 2021 IRS income tax return.****

| Employer's Name | 2021 Amount Earned | Did you receive a W-2? (Circle one) If yes, please attach a copy of the W-2. | |
|-----------------|--------------------|---|----|
| | | Yes | No |
| | | Yes | No |
| | | Yes | No |
| | | Yes | No |

D. PARENTAL INCOME INFORMATION

Check the appropriate box below and provide the requested information and documents (you should only check one):

- My parents used the IRS Data Retrieval Tool to transfer their 2021 IRS income tax information into the FAFSA and made no further changes to the information. *(The school will use the IRS information that was transferred in the verification process.)*
- My parents did not (or could not) transfer their 2021 IRS income information to the FAFSA using the IRS Data Retrieval Tool in FAFSA on the Web. Attached is a copy of their **2021 IRS Tax Return Transcript(s)** or a **signed** copy of the 2021 IRS Federal Income Tax return and applicable schedules. Please see the first page for instructions on how to obtain your 2021 IRS Tax Return Transcript.
- My parents were not employed and had no income earned from work in 2021 and did not and are not required to file a 2021 IRS income tax return. Attached is the **2021 IRS Verification of Non-Filing Letter** for each parent listed on this form and included on my FAFSA.
- My parents were employed in 2021 but did not and are not required to file a 2021 IRS income tax return. They have listed below the names of all of their employers and the amount earned from each employer in 2021. (Please attach copies of all 2021 IRS W-2 forms issued by each employer.) Attach an additional sheet if necessary. Please also attach the **2021 IRS Verification of Non-Filing Letter** for each parent listed on this form and included on your FAFSA. **** Do not check this box if they filed a 2021 IRS income tax return.****

| Employer's Name | 2021 Amount Earned | Did you receive a W-2? (Circle one) If yes, please attach a copy of the W-2. | |
|-----------------|--------------------|---|----|
| | | Yes | No |
| | | Yes | No |
| | | Yes | No |
| | | Yes | No |

E. CERTIFICATION

By signing this worksheet, we certify that all the information reported on it is complete and correct to the best of our knowledge.

STUDENT SIGNATURE: _____ DATE: _____

PARENT SIGNATURE: _____ DATE: _____

Return completed worksheet and required documentation by uploading to your Self-Service account, or return to the address or email address on the front/first page of this form. Contact us at the phone number or email address on the front/first page of this form with any questions.