



Financial Aid Office

Contact Us:
P: (972) 881-5760
Financialaid@collin.edu

2023 – 2024 DEPENDENT VERIFICATION WORKSHEET

Student Information

Name: _____ CWID: _____

Your application has been selected by the Dept. of Education for review in a process called “Verification.” In this process, we are required by federal law (34 CFR, Part 668) to compare information from your Free Application for Federal Student Aid (FAFSA) with information from you (and your spouse if you are married) and your parent(s)/stepparents’ (if you are dependent) 2021 federal **tax transcripts** and/or other financial documents. If there are any discrepancies, we may request further clarification. If corrections are needed, we will make them on your behalf and notify you of the change. **It is important that you respond promptly to this request. We cannot award you financial aid until your file is complete.**

Dependent Student’s Family Information

List below the people in your parent(s)’ household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don’t live with your parent(s).
- Your parent(s)’ other children if your parent(s) will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Include the name of the college for any household member, excluding your parents, who will be enrolled at least half time, in a degree, diploma, or certificate program at a Title IV eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024. *If more space is needed, attach a separate page with your name and Student ID Number at the top.*

Full Name	Age	Relationship	College	Will be 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>		

Office use only:

Aid Year: _____ **Campus:** _____ **Date:** _____ **RRAAREQ Code:** DVST20 **Status Code:** _____ **Initials:** _____

Student's Name: _____

CWID: _____

Income Information to Be Verified

1. Student Information:

A. **TAX RETURN FILERS** - Check one of the following:

- I, the student, certify that I have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2021 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. I also certify that I DID NOT MAKE CHANGES to any of the data once it was transferred.

Your Financial Aid Advisor will verify that you a) used the IRS Data Retrieval Tool in FAFSA and b) made NO CHANGES to the data once it was transferred. If they can confirm both items, they will use the IRS information that was transferred. However, if the Financial Aid Advisor cannot confirm one or both of the above, you will be required to submit a 2021 tax transcript.

- I, the student, was unable or chose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and am submitting to the school my **2021 IRS Tax Return Transcript(s)**—NOT photocopies of the income tax return.

*To obtain an IRS Tax Return Transcript, go to www.irs.gov and click on the "Get Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2017 IRS tax return was filed). It takes up to 2 - 3 weeks for IRS income information to be available for electronic IRS tax return filers, and 8 - 11 weeks for paper IRS tax return filers.*

*If you filed an amended tax return, you will need to submit an "IRS Tax Return Transcript" and a signed copy of the **1040X**.*

B. **TAX RETURN NON-FILERS** – Complete this section if you, the student, will not file and are not required to file a 2021 income tax return with the IRS. If you fall into either category below, you **MUST** provide a Verification of Non-Filing Letter from the IRS with this form.

Check the box that applies:

- I, the student, was not employed and had no income earned from work in 2021.

- I, the student, was employed in 2021 and have listed below the names of all employers and the amount earned from each employer in 2021. Attach copies of all 2021 W-2 forms issued to you by employers. *If more space is needed, attach a separate page with your name and CWID at the top.*

Employer's Name	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>

Please note: Per federal regulations, you are required to submit a 2021 Federal Tax Return Transcript. All tax filers use IRS Form 1040 and any applicable numbered or lettered IRS schedules. Instructions for obtaining a tax transcript can be found above. Please make copies of the tax transcript for your own records PRIOR to submitting the verification paperwork to our office.

Student's Name: _____

CWID: _____

2. Parent Information:

A. TAX RETURN FILERS - Check one of the following:

I, the student's parent, certify that I have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2021 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. I also certify that I DID NOT MAKE CHANGES to any of the data once it was transferred.

The Financial Aid Advisor will verify that you a) used the IRS Data Retrieval Tool in FAFSA and b) made NO CHANGES to the data once it was transferred. If they can confirm both items, they will use the IRS information that was transferred. However, if the Financial Aid Advisor cannot confirm one or both of the above, you will be required to submit a 2021 tax transcript.

I, the student's parent, was unable or chose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and am submitting to the school my (and my spouse's if married) **2021 IRS tax return transcript(s)**—NOT photocopies of the income tax return.

To obtain an IRS tax return transcript, go to www.IRS.gov and click on the "Get Transcript" link, or call 1-800-908-9946.

*Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript." See the student's section on page 2 for more ordering information.*

*If you filed an amended tax return, you will need to submit an "IRS Tax Return Transcript" and a signed copy of the **1040X**.*

B. TAX RETURN NON-FILERS—Complete this section if you, the student's parent(s), will not file and are not required to file a 2021 income tax return with the IRS. If you fall into either category below, you **MUST** provide a Verification of Non-Filing Letter from the IRS with this form.

Check the box that applies:

I, the student's parent, (and/or, if married, your spouse) was not employed and had no income earned from work in 2021.

I, the student's parent, (and/or, if married, your spouse) was employed in 2021 and have listed below the names of all employers and the amount earned from each employer in 2021. Attach copies of **all** 2021 W-2 forms issued to you (and, if married, to your spouse) by employers. *If more space is needed, attach a separate page with your name and CWID at the top.*

Employer's Name	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>

Student's Name: _____

CWID: _____

3. Other Information to Be Verified

1. Both the student and the parent need to complete the chart below. Please put \$0's in any space where the answer is \$0. Do not leave blank.

Student	2021 ADDITIONAL FINANCIAL INFORMATION	Parent(s)
\$	Taxable earnings from need-based employment programs such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Grant and scholarship aid reported to the IRS in the adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
\$	Earnings from work under a Cooperative Education Program offered by a college.	\$
Student	2021 UNTAXED INCOME	Parent(s)
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 Form (Boxes 12a through 12d, codes D, E, F, G, H, and S).	\$
\$	Child support you received for all children. Do not include foster care or adoption payments.	\$
\$	Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Other untaxed income not reported, such as worker's compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. DO NOT INCLUDE: student aid, earned income credit, additional child tax credit, TANF payments, untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.	\$
\$	Money received , or paid on your behalf (e.g., bills), not reported elsewhere on this form.	XXXXXXXX

Certification and Signatures

By signing this worksheet, I (we) certify that all information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature

Date