



Verification Worksheet – V5 Independent 2023-2024 Academic Year

Print Student's Name: _____ Student ID: _____
First Last Puget Sound ID Number

Your FAFSA was selected by the U.S. Department of Education for a review process called "Verification." We are required by federal law to verify that the data provided on your FAFSA is accurate. If there are any discrepancies between your FAFSA and information provided on this worksheet, we will update your application, recalculate your aid eligibility, and notify you of any changes to your financial aid package.

This worksheet and any additional documentation required should be returned to Student Financial Services as soon as possible. All required documentation must be submitted and reviewed before verification can be completed.

Verification must be completed before your financial aid can be applied to your student account and no later than the end of the first term of enrollment for the academic school year. If verification is not completed, all academic year federal, state, and need-based Puget Sound aid will be canceled.

A. Family Information

In the box below list the people in your household, including:

- Yourself and your spouse, if you are married.
- Your children or your spouse's children, if you or your spouse will provide more than half of their support from July 1, 2023 - June 30, 2024, even if the children do not live with you.
- Other people if they now live with you and either you or your spouse provides more than half of their support and will continue to provide more than half of their support from July 1, 2023 - June 30, 2024.
- The college name for any household member who will be attending college at least half-time between July 1, 2023 and June 30, 2024 and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship	College 2023-24
		Self	University of Puget Sound

B. Student 2021 Tax and Income Information

Check only **ONE** box below:

Check here if you filed a 2021 U.S. Income Tax Return and used the IRS Data Retrieval Tool (DRT) to transfer your 2021 IRS U.S. Income Tax Return information into your FAFSA (Data Retrieval Tool instructions below if needed).

Check here if you filed a 2021 IRS U.S. Income Tax Return but are unable to or choose not to use the IRS Data Retrieval Tool (DRT) to transfer your 2021 IRS U.S. Income Tax Return information into your FAFSA and instead have attached a signed copy of your 2021 Income Tax Return and Schedules 1-3 or a 2021 IRS issued Tax Return Transcript.

Check here if you filed an Amended 2021 U.S. Income Tax Return and have attached a signed copy of your 2021 IRS 1040X Form "Amended U.S. Individual Income Tax Return" which was filed with the IRS.

You must also provide **one** of the following:

- ✓ Signed copy of your original 2021 Income Tax Return and Schedules 1-3 that were filed with the IRS.
- ✓ IRS issued 2021 Tax Return Transcript from the original form you filed.

Check here if you did not earn any income and were not required to file a 2021 IRS U.S. Income Tax Return.

You must provide the following documentation:

- ✓ "Verification of Non-Filing Letter" from the IRS attesting that you did not file a 2021 IRS U.S. Income Tax Return. You can obtain this online at <https://www.irs.gov/get-transcript> IRS Form 4506-T and mark box #7.

Check here if you earned income and received a 2021 W-2, but were not required to file a 2021 Tax Return.

You must provide the following documentation:

- ✓ Copy of your 2021 IRS Form W-2 for each source of employment.
- ✓ "Verification of Non-Filing Letter" from the IRS attesting that you did not file a 2021 IRS U.S. Income Tax Return. You can obtain this online at <https://www.irs.gov/get-transcript> IRS Form 4506-T and mark box #7.

Check here if you earned income but did not receive a 2021 W-2 and were not required to file a 2021 Tax Return.

You must provide the following documentation:

- ✓ "Verification of Non-Filing Letter" from the IRS attesting that you did not file a 2021 IRS U.S. Income Tax Return. You can obtain this online at <https://www.irs.gov/get-transcript> IRS Form 4506-T and mark box #7.
- ✓ List below your employer(s) and income received in 2021:

Source of Income / Employer's Name	Amount Earned in 2021
	\$
	\$

C. Verification of Identity

(STOP - section must be completed in person in Jones 019 Student Financial Services)

The student must appear in person at the University of Puget Sound to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport.

The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

D. Statement of Educational Purpose

(STOP - section must be completed in person in Jones 019 Student Financial Services)

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose and
(Print Student's Name)

that the Federal student financial assistance that I may receive will only be used for educational purposes and to pay the cost of attending the University of Puget Sound for 2023-2024.

(Student's Signature)

(Date)

(Student's UPS ID Number)

E. Instructions for Providing 2021 Tax Return Data

Schools must verify FAFSA data with information provided directly from the IRS. If you checked that you filed a 2021 Income Tax Return, you must provide your 2021 IRS tax data to us using one of the following three options: the IRS Data Retrieval Tool (DRT) through the FAFSA, a copy of your 2021 Income Tax Return and Schedules 1-3 signed and dated, or an IRS issued 2021 Tax Return Transcript. Please see instructions below for each option.

NOTE: If you are married and you and your spouse filed separately on your 2021 U.S. Income Tax Return, you must provide either a 2021 IRS Tax Return or 2021 IRS Tax Return Transcript for both of you in order to complete verification.

Option 1: IRS Data Retrieval Tool FAST – EASY – ACCURATE (You do not need to transfer again if already completed)
The easiest way to verify your FAFSA data with accurate tax information is by using the IRS Data Retrieval Tool:

- ✓ Log in at www.FAFSA.gov
- ✓ Click **Make FAFSA Corrections** located in the middle of the page.
- ✓ In the Financial Information section, answer the eligibility questions and click **Link to IRS**.
- ✓ **Proceed to IRS Site**, enter the requested information, and click **Submit**
- ✓ Review information retrieved from your tax return and click **Transfer Now**
- ✓ Complete the process on the Sign and Submit tab of your FAFSA

Option 2: Tax Return - If you do not want to or are not eligible to use the IRS Data Retrieval Tool, you can provide a signed and dated copy of your 2021 Income Tax Return and Schedules 1, 2, and 3 along with this verification worksheet.

Option 3: Tax Return Transcript - If you do not want to or are not eligible to use the IRS Data Retrieval Tool, you can provide an IRS issued 2021 Tax Return Transcript along with this verification worksheet

Tax filers can request a free transcript of their 2021 tax return from the IRS by:

Telephone:

- ✓ Automated Telephone Request – 1-800-908-9946
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

E. Instructions for Providing 2021 Tax Return Data (continued)

Get Transcript by Mail

- ✓ <https://www.irs.gov/individuals/get-transcript>
- ✓ Click "Get Transcript by Mail"
- ✓ Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the online request.

Get Transcript Online

- ✓ <https://www.irs.gov/individuals/get-transcript>
- ✓ Click "Get Transcript Online."
- ✓ Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- ✓ To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan).
- ✓ Transcript displays online upon successful completion of the IRS's two-step authentication.

Paper Request Form:

- ✓ IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

F. Certification and Signature

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

Print Student's Name: _____ Student ID: _____

Student Signature (Required) _____ Date: _____

Spouse Signature (Optional) _____ Date: _____

Warning: If you purposely give false or misleading information on this form, you may be subject to a fine, imprisonment, or both.