



The Office of Financial Aid and Scholarships Verification Worksheet 2023-2024

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. **If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete, sign and submit this Verification Worksheet and attach any required documents to The Office of Financial Aid and Scholarships (OFAS). If you have questions about verification, contact the OFAS.**

Student Last Name _____ Student First Name _____ MI _____ ID# _____

Email Address _____

Permanent Address (include apt #) _____ City _____ State _____ Zip Code _____

Home Telephone Number (include area code) _____ Cell Number (include area code) _____

STEP 1: Please check the appropriate box and include only the information for the checked box.

List the names of all family members who reside in the household.

If additional space is needed, please add additional sheet(s)

- Dependent Students** (List yourself first under “Self”)
 - ❖ Include yourself, your parent(s) including step-parent, parents’ dependent children, and other people living in the household, if your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024.
 - ❖ Write in the name of the college for any family member (excluding your parent(s) who will be attending college in a degree program at least half-time between July 1, 2023 and June 30, 2024.
- Independent Students** (List yourself first.)
 - ❖ Include yourself, your spouse (if married), your children and any other individuals that you will provide more than half of their support from July 1, 2023, through June 30, 2024.
 - ❖ Write in the name of the college for any family member who will be attending college in a degree program at least half-time between July 1, 2023, and June 30, 2024.

Full Name	Age	Relationship	College Attending for 2023-2024	Date of Birth
		Self	Saint Augustine’s University	

Name _____ ID# _____

STEP 2:**Tax Forms and Income Information**

You are encouraged to use the IRS Data Retrieval Tool to transfer information to your FAFSA. If you do not use the IRS Data Retrieval, you **should** submit a 2021 Federal tax transcript from the IRS by visiting www.irs.gov or calling **1-800-908-9946** or a signed copy of your 2021 Federal tax return.

Instructions: Please check the appropriate box that applies to your filing status:

To Be Completed by STUDENT (Dependent/Independent): (Please check the appropriate box)

- I filed a 2021 Federal Income Tax Return and used the IRS Data Retrieval Tool, **or** attaching a copy of my 2021 IRS Tax Return Transcript or a signed copy of the 2021 Federal Tax Return.
- My spouse and I filed a 2021 Federal Income Tax Return. (If filed separately, you both must submit a copy of the 2021 IRS Tax Return Transcript or a signed 2021 Federal Tax Return).
- I filed an amended tax return for 2021. If yes, I am attaching a copy of the tax return transcript or 2021 Federal Tax Return and a signed 1040X.
- I was not employed and not required to file a 2021 Federal Income Tax Return. **(Independent Students Only) A copy of the IRS Non-Tax Filer Letter must be submitted.**
- I was employed in 2021 (Yearly amount earned \$ _____) and not required to file a 2021 Federal Tax Return. **(SUBMIT all 2021 W2's if earned income from work.) (Independent Students Only must submit a copy of the IRS Non-Tax Filer Letter.)**

To Be Completed By PARENT(S): (Please check the appropriate box)

- I/We filed a 2021 Federal Income Tax Return and used the IRS Data Retrieval Tool, **or** attaching a copy of the 2021 IRS Tax Return Transcript or a signed copy of the 2021 Federal Tax Return.
- My spouse and I filed a 2021 Federal Income Tax Return. (If filed separately, you both must submit a copy of the 2021 IRS Tax Return Transcript or a signed 2021 Federal Tax Return).
- I/We filed an amended tax return for 2021? If yes, I am attaching a copy of the tax return transcript or 2021 Federal Tax Return and a signed 1040X.
- I/We were not employed and not required to file a 2021 Federal Income Tax Return. **(A copy of the IRS Non-Tax Filer Letter must be submitted.)**
- I/We were employed in 2021 (Yearly amount earned \$ _____) and not required to file a 2021 Federal Tax Return. **(SUBMIT all 2021 W2's if earned income from work.) (A copy of the IRS Non-Tax Filer Letter must be submitted.)**

For Non-Tax Filer (Parent(s) Only) If your parents did not file a 2021 tax return, please submit a copy of their 2021 Non-Filer Letter from the IRS.

For Non-Tax Filer (Independent Student/Spouse Only) If you and your spouse did not file a 2021 tax return, please submit a copy of you and your spouse 2021 Non-Filer Letter from the IRS.

Instructions for obtaining an IRS Verification of Non-Filing Letter:

All non-tax filers are required to provide an IRS Verification of Non-Filing Letter dated on or after October 1, 2021, that indicates that a 2021 IRS income tax return was not filed with the IRS. After receiving the Verification of Non-Filing Letter from the IRS, include the student's Banner ID, then submit to the The Office of Financial Aid and Scholarships.

- **Paper Request Form-** [IRS Form 4506-T](#)- complete lines 1-4, check box 7, enter 12/31/2021 for box 9, check signatory attestation box, sign, date, and submit to the IRS as instructed. Mail or fax to your respective IRS location depending upon your state of residence as shown on page 2 of the 4506-T form.
- **Online Request** - Go to www.IRS.gov/transcript, and then choose either "Get Transcript Online" or "Get Transcript by Mail." Get transcript online will give you instant delivery via PDF, whereas get transcript by mail, you will receive a copy within 5-10 business days. Make sure to request a 2021 Verification of Non-Filing Letter.
- **Telephone Request** - 1-800-908-9946, after following prompts, select option 2 to request an IRS Verification of Non-Filing Letter and then enter "2021."

Name _____ ID# _____

STEP 3:**Student and Parent's 2021 Untaxed Income**

Independent Student: Please indicate below any of the following that apply to **you (and your spouse)** for the 2021 tax year.

Dependent Student: Please indicate below any of the following that apply to you and **your parent(s)** for the 2021 tax year.

If left blank, the value is assumed to be "0" for processing.

Sources of Untaxed Income	Student/Spouse	Parent
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Do not include amounts reported in code DD (employer contributions toward employee health benefits).	\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from schedule 1-total of lines 16+20.	\$	\$
Child support received for any of your children. (yearly amount) Do not include foster care or adoption payments.	\$	\$
Tax exempt interest income from IRS Form 1040-line 2a.	\$	\$
Untaxed portions of IRA distributions and pensions from IRS Form 1040 - line 4b + 5b) Exclude rollovers. If negative, enter a zero here.	\$	\$
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. (yearly amount)	\$	\$
Veterans' non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. (yearly amount)	\$	\$
Other untaxed income not reported in items 41a through 41g, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13. Do not include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$	\$
Earnings from work under a cooperative education program (co-op) offered by a college. (yearly amount)	\$	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form (yearly amount). Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. Do not enter untaxed combat pay.	\$	\$
Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040 Schedule 3 – Line 3.	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment.	\$	\$
Taxable student grants and scholarship aid reported to IRS in you and/or your parents adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship, portions of fellowships and assistantships. A tax return must have been filed.	\$	\$

Name _____ ID# _____

(Please Check All Applicable Boxes Below)

STEP 4: Child Support Paid

- **Child Support** - Did you, one or both of your parents listed in the household on Step 1 pay child support in 2021?
 Yes No (If yes, complete the section below)

Name of Person Who Paid Child Support	Name of Person to Whom Child Support Was Paid	Name of Child for Whom Support Was Paid	Date of Birth for Whom Child Support Was Paid	Yearly Amount of Child Support Paid in 2021
				\$
				\$
				\$
				\$

STEP 5: Required Signatures

Certification

By signing below, each person certifies that all the information reported on this form is complete and correct.

Warning: *If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.*

Please provide a hand-written signature (not a computer-generated signature)

Student Signature _____ Date _____

Parent Signature _____ Date _____ Relationship to Student _____
(For dependent students)

Mail or email signed completed form to:

**Saint Augustine’s University
The Office of Financial Aid and Scholarships
1315 Oakwood Ave
Raleigh, North Carolina 27610
Telephone #: 919-516-4000
financialaid@st-aug.edu**

Saint Augustine’s University does not discriminate against employees, students, or applicants based on age, color, disability, gender, gender identity, gender expression, national origin, political affiliation, race, religion, sexual orientation, genetic information, veteran status, or any other basis protected by law.