



V5: Verification Worksheet 2023-2024

STUDENT INFORMATION

Student Name _____ MBU ID _____

Address _____ City _____ State _____ Zip Code _____

Student's Primary Phone # _____ Student's Primary Email Address _____

Parent's Primary Phone # _____ Parent's Marital Status _____

HOUSEHOLD INFORMATION

Report below:

- Yourself
- Your parent(s) including step-parent even if you do not live with your parents; do not include your non-custodial parent
- Your parent(s)' other dependent 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 the children do not live with the parents
- Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024
- Provide college information for those students attending at least half-time during 2023-2024 in a program leading to a degree, certificate, or diploma

Full Name	Age	Relationship	Name of College	Undergraduate /Graduate	Will be enrolled at least Half Time (Yes or No)	Expected Graduation Date
		SELF	Mary Baldwin University			

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student Name _____

MBU ID _____

PARENT TAX FILERS:

Complete this section if the parents filed a 2021 IRS income tax return. *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).*

Check the appropriate box below:

- I/We **have used** the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- I/We **have not yet used** the IRS DRT in FAFSA on the Web but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- I/We **are unable or choose not to use** the IRS DRT in FAFSA on the Web and will send the 2021 IRS Tax Return Transcript(s).

Important Notes on IRS Tax Return Transcripts:

- Transcripts may be requested by calling the IRS at **800-908-9946** or by creating an account at **irs.gov/transcripts** and use the "Get Transcript Online" function.
- Be sure to request the correct type of transcript from the IRS - **it must be the RETURN transcript.**
- If parents **filed separately**, 2021 IRS Tax Return Transcripts **must be provided for both** individuals.
- Although not required in every case, we suggest also **submitting copies of all 2021 W-2 forms** received.

STUDENT TAX FILERS:

Complete this section if the student filed a 2021 IRS income tax return. The best way to verify income is submitting a 2021 Tax Return Transcript from the IRS OR a signed copy of your 2021 Federal Income Tax Return.

Check the appropriate box below:

- I **have used** the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the my FAFSA.
 - I **have not yet used** the IRS DRT in FAFSA on the Web but will use the tool to transfer 2021 IRS income tax return information into my FAFSA.
 - I **am unable or choose not to use** the IRS DRT in FAFSA on the Web and will send the 2021 IRS Tax Return Transcript(s).
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Student Name _____

MBU ID _____

NON-TAX FILERS:

Complete this section **ONLY** if parents OR student did not, **and were not required to**, file a 2021 income tax return with the IRS. The term “parents” refers to the parent or parents reported on the FAFSA. Follow each of the steps below:

Step 1: Parent Non-Tax Filer. Check the appropriate box below:

- Neither parent was employed nor had any income earned from work in 2021.
- One or both parents were employed in 2021, **but did not file taxes**, and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes the student’s name and MBU ID.

Employer’s Name	Earned By	2021 Amount Earned	W-2 Provided by Employer?

Step 2: Student Non-Tax Filer. Check the appropriate box below:

- Student was not employed and had no income earned from work in 2021.
- Student was employed in 2021, **but did not file taxes**, and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes the student’s name and MBU ID.

Employer’s Name	Earned By	2021 Amount Earned	W-2 Provided by Employer?

Step 3: Submit copies of all 2021 W-2 Forms received by parents and students who had any income in 2021.

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

- _____ Check here if confirmation of non-filing or a signed statement is provided.
- _____ Check here if confirmation of non-filing or a signed statement will be provided later.

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student Signature

Date

Parent Signature

Date

WARNING: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both.

Student Name _____ MBU ID _____

Instructions: Complete Section A or Section B.

Section A: CAN YOU APPEAR IN PERSON AT MARY BALDWIN UNIVERSITY? YES - Complete only Section A in person at MBU

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

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose	Office of Financial Aid Use Only
I certify that I, _____, am the individual (Print Student's Name) signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Mary Baldwin University for 2023-2024.	Valid Government-issued Photo Identification presented: _____
_____ (Student Signature) (Date)	Date Received: _____
	Received By: _____

Section B: CAN YOU APPEAR IN PERSON AT MARY BALDWIN UNIVERSITY? NO - Complete only Section B in the presence of a Notary

If the student is unable to appear in person at Mary Baldwin University to verify his/her/their identity, the student must provide to the institution:

- a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as, but not limited to, a driver's license, other state-issued ID, or passport, AND
- b) The ORIGINAL Statement of Educational Purpose provided below, signed in the presence of a notary. The form must be notarized. We cannot accept anything other than the original form.

Statement of Educational Purpose	
I certify that I, _____, am the individual signing this Statement of Educational Purpose and that the (Print Student's Name)	
Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Mary Baldwin University for 2023-2024.	
_____ (Student Signature)	_____ (Date)

Notary's Certificate of Acknowledgement

State of _____ City/County of _____

On _____, before me, _____ personally appeared,
(Date) (Notary's name)

_____, and proved to me on basis of satisfactory evidence of
(Printed name of signer)

identification _____, to be the
(Type of government-issued photo ID provided)

(SEAL)

above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(Notary signature) My commission expires on _____
(Date)