



V5: Independent Verification Worksheet 2023-2024

Student Name _____ MBU ID _____

Address _____ City _____ State _____ Zip Code _____

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

Spouse (if married) Primary Phone # _____

HOUSEHOLD INFORMATION

Report below:

- Yourself
- Your spouse, if married
- Your children if you will provide more than half of their support from July 1, 2023 through June 30, 2024
- Other people only if they now live with you and you or your spouse 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 TAX FILERS:

Complete this section if the student (and spouse, if married) 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 you and your spouse (if married) **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 Name _____

MBU ID _____

NON-TAX FILERS:

Complete this section **ONLY** if the student (or spouse, if married) did not, **and were not required to**, file a 2021 income tax return with the IRS. Follow each of the steps below:

If you are married, you must complete Step 1 AND Step 2

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

- The student was not employed nor had any income earned from work in 2021.
- The 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 2: Spouse (if married) Non-Tax Filer. Check the appropriate box below:

- Spouse was not employed and had no income earned from work in 2021.
- Spouse 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 student (and spouse, if married) for any income received 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 spouse (if married) whose information was reported on the FAFSA must sign and date.

Student Signature

Date

Spouse Signature

Date

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

