MUSC
Medical University of South Carolina

Changing What's Possible

2023-2024 Verification Worksheet

Independent Student – Tracking Group V5

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you (and your spouse, if married) reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Independent Student's Information

First and Last Name:_____PVID, or Last 4 SSN: _____
Date of Birth:_____ Email: _____
Address: _____
City:_____ State:_____ Zip Code: _____
Phone Number: _____

B. Independent Student's Family Information

Number of Household Members: List below the people in the parents' household. Include:

- The student
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2023, through June 30, 2024, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2024.

Number in College: Please include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024, include the name of the college.

**If more space is needed, provide a separate page with the student's name and ID number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
Missy Jones (example)	*27*	*Spouse*	*Central University*	*Yes*

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.

C. Independent Student's Income Information to be Verified

1. Tax Return Filers

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the student filed or will file a 2021 IRS income tax return(s). ***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.*** In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

☐ The student has used the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.

☐ The student has 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 once the 2021 IRS income tax return has been filed.

☐ The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the school with a 2021 IRS Tax Return Transcript(s).

A **2021 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail**: Go to www.IRS.gov; click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and ***NOT*** the "IRS Tax Account Transcript."
- **Get Transcript ONLINE**: Go to www.IRS.gov; click "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and ***NOT*** the "IRS Tax Account Transcript."
- **Telephone Request:** 1-800-908-9946
- **Paper Request Form:** Use the links to download IRS Form 4506T

When requesting a transcript, use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return).

In most cases, for electronic filers, 2021 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2021 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the 2021 IRS income tax information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2021 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s)** must be provided for each.

☐Check here if a **2021 IRS Tax Return Transcript(s)** is provided.
☐Check here if a **2021 IRS Tax Return Transcript(s)** will be provided later.

2. Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student will not file and is not required to file a 2021 income tax return with the IRS.

Check the box that applies:

☐The student and spouse were not employed and had no income earned from work in 2021.
☐The student and/or spouse was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. (Provide copies of all 2021 IRS W-2 forms issued to the student and/or spouse by their employers). List every employer even if they did not issue an IRS W-2 form.

**If more space is needed, provide a separate page with the student's name and ID number at the top.*

Employer's Name	**2021 Amount Earned**	**IRS W-2 Attached (Yes or No)**
ABC Shipping (example)	*$1,280*	*Yes*

You must also provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

Documentation includes a verification of non-filing letter from the IRS. This form may be obtained by completing an IRS Form 4506-T and checking box 7. An IRS form 4506-T may be downloaded here.

Check the box that applies:

☐Check here if a confirmation of non-filing is provided.

☐Check here if a confirmation of non-filing will be provided later.

D.Identity and Statement of Educational Purpose

Section D is ONLY to be completed in person at the Institution or in front of a Notary.

Identity and Statement of Education Purpose (Signed in person at the Institution)

The student must appear in person at_____*(Name of Postsecondary Education Institution)* 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.

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

If the student is unable to appear in person at_____ *(Name of Postsecondary Education Institution)* to verify his or her 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, or that is presented to a notary, 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, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

The following Statement of Educational Purpose is to be completed only in the presence of designated school official or notary.

Statement of Educational Purpose

I certify that I,_____*(Student's Name),* am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposed and to pay the cost of attending _____ *(Name of Postsecondary Educational Institution)* for 2022-2023.

Student's Signature:_____Date: _____

Financial Aid Office Signature:_____Date: _____

Notary's Certificate of Knowledge

State of_____City/County of_____On _____ before me,_____*(Notary's Name)* personally appeared,_____*(Printed name of signer)* and proved to me on basis of satisfactory evidence of identification_____*(Type of government-issued photo ID provided)* to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal.

Notary Signature: _____

Date Commission Expires: _____

(Seal)

Return this original form with your proof of high school completion and proof of Identity to your school's financial aid office.

Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. **WARNING: If you purposely give false or misleading Information on this worksheet, you may be fined, be sentenced to jail, or both.**

The student must sign and date.

Student's Signature:_____ **Date**: _____

Spouse's Signature:_____ **Date**: _____