

V5 Independent 2022-23 Verification Worksheet

Your 2022-23 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 we 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 all sections and sign this worksheet and submit the form and along with required documents to the financial aid office. We may ask for additional information if necessary.

A. Independent Student's Information

Student's Last Name	Student's First Name	MI	ID Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip	Student's Email Address
Student's Phone Number		Student's Alternate or Cell Phone Number	

B. Independent Student's Family Information

Number of Household Members: List below the people in the student's 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, 2022, through June 30, 2023, 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, 2022.

Number in College: Please include in the "College" column 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, 2022, and June 30, 2023, 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
		SELF	MISERICORDIA 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.

C. Independent Student's Income Information to Be Verified – Complete either 1. or 2.**1. Verification of 2020 Income Information for Student Tax 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 2020 or had a change in marital status after December 31, 2020.

Instructions: Complete this section if the student and spouse filed or will file a 2020 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 <https://studentaid.gov/>.* In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- ☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2020 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 2020 IRS income tax return information into the student's FAFSA.
- ☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules**.

A **2020 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 "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "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). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form. **This form is used to request a Tax Return Transcript or Verification of Nonfiling.**

If the student and spouse filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** must be provided for each.

_____ Check here if a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** is provided.

_____ Check here if a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** will be provided later.

Student Name: _____

Student ID Number: _____

2. Verification of 2020 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2020 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 2020.
- ☐ The student and/or spouse were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2020 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer 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	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2020
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2020 IRS income tax return was not filed with the IRS (**see page 2 for instructions**) or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of nonfiling from the IRS or other relevant tax authority and was unable to obtain the required documentation.

- ____ Check here if confirmation of nonfiling or a signed statement is provided.
- ____ Check here if confirmation of nonfiling or a signed statement will be provided later.

Student Name: _____

Student ID Number: _____

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 Misericordia University – Financial Aid Office 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 Misericordia University – Financial Aid Office 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.

In addition, the student must sign, in the presence of a notary, the below Statement of Education Purpose.

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

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Misericordia University** for 2022-23.

_____ (Student's Signature)	_____ (Date)	_____ (Student's ID Number)
_____ (Financial Aid Administrator's Signature)	_____ Date	

Notary's Certificate of Knowledge

State of _____ City/County of _____
before me, _____ personally appeared,
(Notary's Name) (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 Identity to your school's financial aid office.

Student Name: _____

Student ID Number: _____

E. 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, sent to prison, or both.

The student must sign and date this form.

Student's Signature

Date

Spouse's Signature (optional)

Date

You should make a copy of this worksheet for your records.

PLEASE: DO NOT EMAIL sensitive information such as tax documents, social security numbers or other personally identifiable information. Instead, fax to 570-674-3063 or mail to:

Student Financial Services, Misericordia University, 301 Lake Street, Dallas, PA 18612