Independent Verification Worksheet
2023-2024

Your FAFSA has been selected for a review process called "Verification." In this process, NAU will be comparing information from your FAFSA application with copies of you and your parent(s)' 2021 IRS Tax Return Transcripts, W-2 forms and/or other financial documents. The law requires completion of Verification before awarding and/or disbursing federal aid. If there are differences between your FAFSA application and your verification documentation, electronic corrections to your FAFSA may be required.

*Please **TYPE** Responses & Sign with Pen*

A. STUDENT INFORMATION

_____

Last Name   First Name   M.I.   Student ID #

_____   _____

Address (includes apt. no.)   Date of Birth

_____   _____

City   State   Zip Code   Phone Number

B. FAMILY/HOUSEHOLD INFORMATION

List yourself (and spouse) and the people you/your spouse will provide more than half of their support for between **July 1, 2023 - June 30, 2024,** in the table below**.** If you/your spouse do not provide more than half of their support, do **NOT** include them.

1. **Student:** List yourself in the table below

2. **Your Spouse:** If married, list your spouse in the table below and complete Section D.

3. **Children:** List you and your spouse's children if you/your spouse will provide more than half of the children's support from **July 1, 2023, through June 30, 2024**, even if the child does not live with the student.

4. **Other Member(s):** List other people in your household only if they now live with you and you/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.**

5. **Number in College:** List the name of the college for any household member who will be enrolled at least half-time in a degree, diploma, or certificate program at an eligible postsecondary educational institution between **July 1, 2023 and June 30, 2024** .

Full Name	Age	Relationship	College	Enrolled At Least ½ Time?	
		SELF	NAU	☐ Yes	☐ No
				☐ Yes	☐ No
				☐ Yes	☐ No
				☐ Yes	☐ No
				☐ Yes	☐ No
				☐ Yes	☐ No
				☐ Yes	☐ No
				☐ Yes	☐ No

If you need more space, attach a separate page with the student's name and ID number at the top.

C. STUDENT TAX INFORMATION

1. Check only **ONE** box below and submit the required documentation:

   A. ☐ I used the IRS Data Retrieval Tool to transfer my 2021 tax information on to my FAFSA.

   B. ☐ I am unable or choose not to use the IRS Data Retrieval Tool and instead I am attaching a 2021 IRS Tax Return Transcript or a **SIGNED** 2021 U.S. Income Tax Return **with all applicable schedules.**

   C. ☐ I was not employed. I will not file and am not required to file a 2021 U.S. Income Tax Return.

   ☐ I am attaching a 2021 Verification of Non-Filing Letter from the IRS.

   D. ☐ I was employed during 2021 but will not file a 2021 U.S. Income Tax Return.

   ☐ I am attaching a 2021 Verification of Non-Filing Letter from the IRS.

   ☐ I am attaching my 2021 W-2 from each employer or 1099-MISC

   - List below the names of all employers and the amount earned from each employer

	Sources/Employer Name	2021 Income Amount
Complete chart only if box D above is checked		$
		$
		$

D. SPOUSE TAX INFORMATION (IF APPLICABLE)

1. Check only **ONE** box below and submit the required documentation:

   A. ☐ I used the IRS Data Retrieval Tool to transfer my 2021 tax information on to my spouse's FAFSA.

   B. ☐ I am unable to use the IRS Data Retrieval Tool and instead I am attaching a 2021 IRS Tax Return Transcript or a **SIGNED** 2021 U.S. Income Tax Return **with all applicable schedules.**

   C. ☐ I was not employed. I will not file and am not required to file a 2021 U.S. Income Tax Return.

   ☐ I am attaching a 2021 Verification of Non-Filing Letter from the IRS.

   D. ☐ I was employed during 2021 but will not file a 2021 U.S. Income Tax Return.

   ☐ I am attaching a 2021 Verification of Non-Filing Letter from the IRS.

   ☐ I am attaching my 2021 W-2 from each employer or 1099-MISC

   - List the names of all employers and the amount earned from each employer below

	Sources/Employer Name	2021 Income Amount
Complete chart only if box D above is checked		$
		$
		$

E. SIGN – MANUALLY SIGN USING A PEN

Each person signing this form certifies that all the information reported on it is complete and accurate.

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

_____   _____
Student Signature   Date   Spouse Signature   Date

Please sign with a pen.
Forms with digital/electronic/typed signatures
cannot be accepted.

IRS Data Retrieval Tool

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) while completing the FAFSA. Using this tool is the easiest and most accurate way to complete the application. This tool automatically imports the tax information from the correct year's tax return directly into the FAFSA, which saves time and ensures accuracy! To use the IRS Data Retrieval Tool, you and your spouse/parent's identifying information entered must match exactly what is reported on their tax return. 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.

IRS Tax Return Transcript

If you are unable to use the IRS DRT, you can obtain a 2021 IRS Tax Return Transcript using one of the following options:

• **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.

• **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."

• **Automated Telephone Request** – 1-800-908-9946.

• **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T.

Transcripts are generally received within 10 business days from the IRS's receipt of your request except for the "Get Transcript Online" option which displays the transcript upon successful completion of the IRS's two-step authentication.