

# ANTIOCH UNIVERSITY

## 2023-2024 INDEPENDENT VERIFICATION WORKSHEET (V5)

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for a process called verification. The U.S. Department of Education regulations state that before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA. You must complete and sign this worksheet, attach any required documents, and submit them to the Financial Aid Office. If you have questions about verification, please contact the Financial Aid Office as soon as possible at your campus so that your financial aid will not be delayed.

You may attach additional pages as necessary to this form. If you do so, please be sure to include the Student's Full Name and Student ID number on *each page attached*.

### Independent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	AU Student ID#
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

### Independent Student's Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if they do not live with you.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Include 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 a postsecondary educational institution any time between July 1, 2023, and June 30, 2024.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
Marty Jones(example)	28	Spouse	Central University	Yes
		Self		

## **Income Verification**

Complete this section if you, the student and/or your spouse filed a 2021 income tax return with the IRS.

As part of verification, the Financial Aid Office is required to collect your official tax data, either through the FAFSA IRS Data Retrieval Tool (DRT) or via an IRS Tax Return Transcript. A copy of your Tax Return (1040, 1040A, or 1040EZ) is **not** acceptable for verification purposes. You must complete one of the steps outlined in the chart below.

**Please review and check one of the following:**

<input type="checkbox"/>	I have successfully used the FAFSA's IRS Data Retrieval Tool to load my (and my spouse's) income information onto the FAFSA and submitted the FAFSA transaction.
<input type="checkbox"/>	I have not yet, but will use the FAFSA's Data Retrieval Tool ( <i>instructions below</i> ) to transfer my (and my spouse's) income information onto the FAFSA. ( <i>please note verification <b>cannot</b> be completed until this information is received</i> )
<input type="checkbox"/>	I am unable or chose not to use the FAFSA's Data Retrieval Tool to transfer my income information. I have attached a copy of my 2021 <b>signed</b> Tax Return here. (If you have not retained a copy of your 2021 tax return, you can request a copy of your 2021 <b>Tax Return Transcript</b> to be mailed to you ( <i>instructions below</i> )).
<input type="checkbox"/>	I filed an Amended Income Tax Return, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. I will contact the Financial Aid Office for detailed instructions on how to complete verification.
<input type="checkbox"/>	I did not and am not required to file a 2021 Federal Tax Return. I will complete the <b>Tax Return Non-Filer</b> section below.

- The best way to verify income is by using the IRS Data Retrieval Tool (DRT) on the FAFSA. If you have not already used the tool, go to [FAFSA.gov](https://fafsa.gov), log in to the 2023-2024 FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2021 IRS tax information into the FAFSA. After uploading tax data, **please be sure to submit the FAFSA**.
- To obtain a 2021 Federal Tax Return Transcript from the IRS, go to [www.IRS.gov](https://www.irs.gov) and click on the "Get Your Tax Record" link, or call **1-800-908-9946**. Make certain to request the "IRS Tax **Return** Transcript" and not the "IRS tax *account* transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2021 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

### **Tax Return Non-Filers**

Complete this section if you, the student and/or your spouse will not file and are not required to file a 2021 income tax return with the IRS, but earned income from work in 2021. More information about who is required to file can be found at [www.irs.gov](http://www.irs.gov). If you are required to file a return, but have not, you must file your return in order to be considered for Federal Student Aid.

1. In the following table, please list all earnings from work during 2021 **and attach a 2021 W2 or 1099-MISC for each line item**. Your application cannot be considered complete until all earnings from work can be verified with a W2 or 1099-MISC.

Source of Income from Work in 2021	Student	Spouse	IRS W-2 or 1099 Attached?
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Total Income from Work in 2021	\$	\$	

- If you did not retain copies of your 2021 W-2(s), you can obtain a 2021 Federal Wage and Income Transcript from the IRS, call **1-800-908-9946** or go to [www.irs.gov](http://www.irs.gov). There, click on the “Get Your Tax Record” link. Follow the on-screen instructions to log in or to create an IRS account. Once your account is created, make certain to request the **2021 “Wage and Income Transcript,”** and submit this to the Financial Aid Office.
2. For both parent and student non-tax filer, provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority. To obtain confirmation of non-filing, go to [www.irs.gov](http://www.irs.gov) and click on the “Get Tax Record” link. Make certain to request the “Verification of Non-filing Letter”. Alternatively, a confirmation of non-filing can be obtained from the IRS using Form 4506-T and checking box 7. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

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

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

### **Verification of Other Untaxed Income**

Complete this section for you and your spouse. **Please indicate “zero” if not applicable. DO NOT LEAVE BLANK.**

1. If you did not have any source of work income in 2021, please attach a statement describing how you met your living expenses in 2021.
2. **Payments to tax-deferred pension and retirement savings** – List any payment (direct or withheld from earnings) to tax deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d codes D, E, F, G, H, and S.

Name of Person (Student or Spouse) Who Made the Payment	Annual Amount Paid in 2021
	\$
	\$
	\$
	\$
<b>Total Payments to Tax-deferred Pension and Retirement Savings:</b>	\$

## **Certification and Signature**

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

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Print Student's Name

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Print Spouse's Name

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Student's Signature

Date

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Spouse's Signature

Date

# ANTIOCH UNIVERSITY

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## **Identity and Statement of Educational Purpose (To Be Signed at the Institution)**

You (the student) must appear in person at Antioch University to verify your identity 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 Statement of Educational Purpose provided below.

### Statement of Educational Purpose

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 Antioch University for 2023-24.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)