

# Westminster College

## 2023-2024 Verification Worksheet (V5)

Your FAFSA application was selected for review in a process called "Verification". In this process, we are required to compare information from your FAFSA with copies of your, your spouse's (if married), or your parents' (if you are dependent) 2021 federal tax return transcripts, or if not filing taxes with W-2 forms or other financial documents. (Please see enclosed letter for documents required) Federal regulations require us to collect this information before disbursing any federal aid. If there are differences between your FAFSA and the verification documents, we will submit the corrections to the federal student aid processor for reprocessing.

### A. Student Information

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

Street Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Student ID: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Contact Phone # \_\_\_\_\_

### B. Family Information (If more space is needed, please attach a separate page with the student's name and Student ID Number at the top.)

List the people living in your household between July 1, 2023 – June 30, 2024: **If a Dependent Student, include:**

**If an Independent Student, include:**

- Yourself and your spouse (if you are married)
- Your dependent children and others, if you provide more than half of their support

- Yourself & parent(s) you live with (include stepparent)
- Your parents' dependent children and others, if your parents will provide more than half of their support or if the children would be required to provide parent information when applying for Federal Aid.

Full Name (Student and Family Members)	Age	Relationship to Student	College Name (if enrolled at least half-time in 2023-2024) Note: Do not include parents in college
		<i>Self</i>	<i>Westminster College</i>

### C. Tax Return Transcript & Income Information **\*\*Please refer to instructions on the back of this form\*\***

#### Student (and Spouse, if applicable)

Check the box that applies:

- I have completed the IRS Data Retrieval Match on <https://fafsa.gov>.
- I have attached a copy of my 2021 IRS Federal Tax Return Transcript that was requested from the IRS or a **Signed** Copy of 2021 Federal Tax Return that includes all applicable schedules.
- I am not required to file a 2021 Federal income tax return. **Attached are copies of my 2021 W-2 forms or statement of income received if no W-2(s).**
- I am not required to file a 2021 Federal income tax return. **I earned no income in 2021.**

#### Parent(s) of dependent students

Check the box that applies:

- My parent(s) have completed the IRS Data Retrieval Match on my FAFSA at <https://fafsa.gov>.
- My parent(s) have attached a copy of their 2021 IRS Federal Tax Return Transcript that was requested from the IRS or a **Signed** Copy of 2021 Federal Tax Return that includes all applicable schedules.
- My parent(s) are not required to file a 2021 Federal income tax return. **Attached are copies of my parent(s) 2021 W-2 forms or statement of income received if no W-2(s) and I have included the verification of non-filing letter requested from the IRS.**
- My parent(s) are not required to file a 2021 Federal income tax return. **My parent(s) earned no income in 2021 and I have included the verification of non-filing letter requested from the IRS.**

By signing this worksheet, I (We) certify that all the information reported on this worksheet is complete and correct. (For dependent students, the student and at least one parent must sign).

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent signature (Dependent Students Only)

\_\_\_\_\_  
Date

## Make a FAFSA Correction by Using the IRS Data Retrieval Process

This process is available to the student and/or parent tax filer within 2 to 3 weeks after electronically filing your 2021 Federal income tax return (6-8 weeks if the tax return is filed by paper) and paying your IRS tax liability, if applicable. This is the fastest, easiest and most accurate way to include your final 2021 Federal income tax information on the FAFSA application.

1. Go to <https://fafsa.gov>.
2. Log into your FAFSA record.
3. Select “Make FAFSA Corrections”.
4. Navigate to the Financial Information section of the FAFSA application for the student and parent (dependent students).
5. Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into your 2023-2024 FAFSA.

## OR You May Use the IRS Tax Return Transcript Request Process

2021 Federal income tax filers (students and parents) who elect not to use the IRS Data Retrieval Process or do not qualify to use the IRS Data Retrieval Process must submit a 2021 IRS Tax Return Transcript to the Student Financial Planning Office. To request a return transcript free of charge from the IRS, select the one of the following methods. Your 2021 Federal income tax return must be accepted by the IRS and you must have paid your 2021 IRS tax liability, if applicable, before you may request a transcript.

### On-line:

1. Go to [www.irs.gov](http://www.irs.gov)
2. Click on the “**Get Your Tax Record**” box.
3. You may click on the “**Get Transcript ONLINE**” box and follow the instructions that will allow you to print out **2021** return transcript(s) immediately **OR**
4. You may click on the “**Get Transcript by MAIL**” box and Enter the tax filer’s Social Security Number, date of birth, street address, and zip code. (Be sure to use the **exact** address currently on file with the IRS). Click Continue; In the Type of Transcript drop-down box choose, “**Return Transcript**” and in the Tax Year drop-down box, select “**2021**”. If successfully validated, tax filers can expect to receive paper IRS Tax Transcript(s) in the mail within 5 – 10 days **OR**
5. By Automated Telephone Request by dialing 1-800-908-9946 and following the prompts. Transcript is generally received within 5-10 business days from the IRS’s receipt of the telephone request.

*\*\*If you are unable to obtain the required 2021 Federal Tax Return Transcript(s) by using one of the above methods you will need to contact the IRS at 1-800-829-1040, then choose option #1, option #2, option #1, option #2 or visit your local Internal Revenue Service Office to obtain a copy.*

## Process for Parent Non-Tax Filers

Parents who are not required to file 2021 Federal income taxes **must complete and send the enclosed IRS Form 4506-T to request a Verification of Non-Filing letter from the IRS, as required by the Department of Education. Once the Non-Filing letter is received from the IRS, please send to Westminster College, Attn: Financial Aid Office, 501 Westminster Avenue, Fulton, MO 65251**

**D. Identity and Statement of Educational Purpose** (Choose the In Person **or** Mail Option)

**In Person Option:**

The student must appear in person at **Westminster College** to verify his or her identity by presenting an unexpired 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.

\_\_\_\_\_  
(Financial Aid Office Staff signature) (Date) (Type of valid (non-expired) government-issued photo ID provided)

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below:

**Identity and Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this *Statement of Educational Purpose* and that the  
(Print Student's Name)

Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Westminster College** for 2023-2024.

\_\_\_\_\_  
(Student Signature)

\_\_\_\_\_  
(Student ID Number)

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

**Mail Option for students unable to appear in person (To Be Signed in the Presence of a Notary):**

If the student is unable to appear in person at **Westminster College** 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.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the  
(Print Student's Name)

Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Westminster College** for 2023-2024.

\_\_\_\_\_  
(Student Signature)

\_\_\_\_\_  
(Student ID Number)

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

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_, personally appeared,  
(Date) (Print Notary's name)

\_\_\_\_\_, and proved to me because of satisfactory evidence of identification  
(Printed name of signer)

\_\_\_\_\_ to be the above-named person who signed the foregoing instrument.  
(Type of unexpired government-issued photo ID provided)

**WITNESS my hand and official seal**

\_\_\_\_\_  
(Notary signature)

place seal here

My commission expires on \_\_\_\_\_  
(Date)