

2023-2024 Verification Worksheet for Independent Students

All documents should be signed and submitted via secure file upload at link.stthomas.edu/FAfiledrop

Your application was selected for review in a process called "Verification." Our office is required to collect information and documentation to verify the information provided on your FAFSA is true and correct. Please complete this verification worksheet and return it to our office as soon as possible, so your financial aid won't be delayed.

Note: If there are discrepancies between your FAFSA information and the federal tax return copies you provide, we may submit corrections to the Federal Processor on your behalf. If necessary, you will receive a new Student Aid Report (SAR) noting the corrections we made to your data.

Section A. Student Information			
Last Name	First Name	M.I.	ID Number
Phone Number	Permanent Street Address	City, State, Zip Code	

Section B. Family Information

List the members of your household, including:

- yourself,
- your spouse; and
- your children (if you will provide more than half of their support from July 1, 2023 through June 30, 2024, even if they do not live with you); and
- other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2023 and June 30, 2024.

Write the names of all household members in the spaces below. If any household members will be attending college at least half-time between July 1, 2023 and June 30, 2024 and will be enrolled in a degree or certificate program, please include the name of the college. High school students taking college courses are not considered to be attending college for federal aid purposes. If you need more space, attach a separate page.

	Full Name	Age	Relationship to Student	Name of College Attending in 2023-2024
Student			<i>self</i>	<i>University of St. Thomas</i>
Family Members				
Family Members				
Family Members				
Family Members				
Family Members				
Family Members				

Federal regulations allow post-secondary schools the right to ask you for information before awarding any financial aid. (C.F.R. Title 34, Part 668, the student financial aid program rules).

Section C. Student's Tax Filing Status and Income Information

What is your 2021 tax filing status?

- I have filed a 2021 federal tax return. Skip to Section E (unless married) and follow directions to provide your confirmed tax data.
- I did not file and was not required to file a 2021 federal tax return. Provide a Verification of Non-filing Letter from the IRS dated after Oct. 1, 2022 (See Section E-3). If you had earnings, complete the income table below and submit all supporting W-2 or other earnings statements with this form.

Employer - Attach additional page if needed	2021 Earnings - attach all supporting W-2 statements
	\$
	\$

Rollovers: If you or your spouse reported income in 2021 from an IRA distribution or pension and any of the reported income was a rollover to a qualified retirement plan, please indicate the amount of the rollover below and submit a copy of the documentation regarding any rollover disclosed on this form.

2021 Total IRA/Pension Rollover \$ _____ Spouse's 2021 Total IRA/Pension Rollover \$ _____

Section D. Spouse's Tax Filing Status and Income Information

What is your spouse's 2021 tax filing status?

- My spouse has filed a 2021 federal tax return. Skip to Section E and follow directions to provide confirmed tax data.
- My spouse did not file and was not required to file a 2021 federal tax return. Provide a Verification of Non-filing Letter from the IRS dated after Oct. 1, 2022 (See Section E-3). If your spouse had earnings, complete the income table below and submit all supporting W-2 or other earnings statements with this form.

Employer - Attach additional page if needed	2021 Earnings - attach all supporting W-2 statements
	\$
	\$

Section E. How to Provide Tax Data to the Financial Aid Office

Use one of the following methods to provide your 2021 tax information to the Financial Aid Office. *Note: if you filed your FAFSA initially using IRS Data Retrieval and you did not change any of the transferred information, you do not need to take further action. Simply return this form signed and complete.*

1. IRS Data Retrieval (preferred method):

To transfer tax information, the student must log in to the student's processed 2023-2024 FAFSA, click on the "Financial Information" tab in the top navigation menu, and answer the questions to determine if you are eligible to use IRS Data Retrieval. If eligible, enter your FSA ID (or apply for one) and click the blue "LINK TO IRS" button. You will be asked to input your tax filing status and address to verify your identity. Please input your address exactly as it appears on your filed tax return.

Once your identity is confirmed, select "Transfer Now" and follow the on-screen instructions to submit the FAFSA update. FAFSA updates should be received by the Financial Aid Office within 2-3 business days.

2. Submit a signed 2021 Federal Tax Return copy or 2021 Tax Return Transcript:

The Financial Aid Office is allowed to accept a copy of a signed 2021 Federal Tax Return 1040 and accompanying schedules. All tax returns must be signed either with a hand written signature by the tax return filer or with a tax preparer EIN or PTIN. Upload documents at link.stthomas.edu/FAfiledrop

3. Request a Verification of Non-filing Letter from the IRS:

Required for any applicant/spouse who did not file a tax return in 2021. Verification letters can be requested online at www.irs.gov/individuals/get-transcript, or by mail using Form 4506-T and checking box 7.

Sign this Worksheet

By signing this worksheet, I certify that all 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, sentenced to jail, or both.**

X Student Signature _____ Date _____

Mail or upload this worksheet with tax documents to:
University of St. Thomas
Financial Aid Office - Mail 5007
2115 Summit Avenue, St. Paul, MN 55105-1096
link.stthomas.edu/FAfiledrop