Important Information about Federal Verification and Instructions for Completing the Federal Verification Worksheet - Dependent Student

2023-2024

Step 1 – Student Information
Provide all information requested.

Step 2 – Household Information (including all household members, whether or not they are enrolled in college)
The federal definition of “parent” includes only the primary residential parent and that parent’s current spouse. In case of separation or divorce of natural or adoptive parents, the secondary household parent is not to be listed in the table.

Include the Full Name, Age, and Relationship of:
- Self
- Parents
  - If married include both parents
  - If divorced or separated include only primary residential parent
  - If remarried, include parent and stepparent
- Children
  - Your primary residential parent’s children and stepchildren if your primary parent will provide more than half of their support from July 1, 2023 through July 30, 2024 or if the children and stepchildren would be required to provide parental information for completing a FAFSA® for 2023-2024.
- Other People only if they now live with your primary residential parent and your parent will provide more than half of their support from July 1, 2023 through June 30, 2024.

Include all members of your household, based on the definitions above. If more space is needed, attach a separate page with the requested information for the additional household members.

Include the Name of College, Undergraduate/Graduate Level, and Half-Time/Full-Time status for those siblings attending at least half-time during 2023-2024 in a program leading to a degree, diploma, or certificate. “Half-time” means a minimum of 6 credit hours (or 12 weekly clock hours at schools not using credit hours). List all household members, but include college information for siblings only.

Step 3 – Student’s Tax Filing Status – Calendar Year 2021
Check NO if you were not required to and did not file a 2021 U.S. income tax return.

If no, then you must complete and return with the Federal Verification Worksheet the Student Non-Tax Filer Certification, upon which you must list the names of all of your employers and the amount earned from each employer in 2021. Attach copies of all 2021 IRS forms W-2 issued by employers to you. List every employer even if an IRS form W-2 was not issued. If more space is needed, attach a separate page listing additional employers. In addition, the student must request from the IRS a Verification of Non-filing letter for tax year 2021 at (irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When the letter is received by the student, then the student must send a copy to Student Financial Aid along with the student’s full name and Wake Forest Student ID#.

Check YES if you filed a 2021 U.S. federal income tax return, or if you were required to and will file a 2021 U.S. income tax return.

If yes, then you must use the IRS DRT in the FAFSA® or provide to Student Financial Aid a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules, and/or any other document(s) required by Student Financial Aid. (Request from the IRS a Tax Return Transcript for tax year 2021 at (irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When the transcript is received by the student, then the student must provide a copy to Student Financial Aid, noting the student’s full name and Wake Forest Student ID#.)

Step 4 – Parent(s)’ Tax Filing Status – Calendar year 2021
Check NO if your parent(s) were not required to and did not file a 2021 U.S. income tax return.
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If no, then your parent(s) must complete and return with the Federal Verification Worksheet the **Parent Non-Tax Filer Certification**, upon which your parent(s) must list the names of all employers and the amount earned from each employer in 2021. Attach copies of all 2021 IRS forms W-2 issued by employers to your parent(s). List every employer even if an IRS form W-2 was not issued. If more space is needed, attach a separate page listing additional employers. In addition, the parent(s) must request from the IRS a Verification of Non-filing letter for tax year 2021 at (irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When the letter is received by the parent(s), then the parent(s) must provide a copy to Student Financial Aid, noting the student’s full name and Wake Forest Student ID#.

Check **YES** if your parent(s) filed a 2021 U.S. federal income tax return, or if your parent(s) were required to and will file a 2021 U.S. income tax return.

If yes, then you must use the IRS DRT in the FAFSA® or provide to Student Financial Aid a **2021 IRS Tax Return Transcript** or a **signed copy of the 2021 income tax return and applicable schedules**, and/or any other document(s) required by Student Financial Aid. (Request from the IRS a Tax Return Transcript for tax year 2021 at (irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When the transcript(s) are received by the parent(s), then the parent(s) must provide a copy to Student Financial Aid, noting the student’s full name and Wake Forest Student ID#.)

**CERTIFICATION** – Each person signing the Verification Worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

Return the completed Federal Verification Worksheet and all required documents to Student Financial Aid, Room 4, Reynolda Hall, or via mail to PO Box 7246, Winston-Salem, NC 27109 Please contact us at finaid@wfu.edu or 336.758.5154 if you have questions.

Important Information about Federal Verification

Your federal student aid application (FAFSA®) has been selected by the U.S. Department of Education for its federal verification process. For dependent students, information to be verified relates to the student and to their parent(s). Please note carefully the documentation required to verify this information listed below. You must complete and return the Federal Verification Worksheet and all other required documentation to avoid cancellation of your Federal Student Aid. For 2023-2024, information to be verified includes number of household members; number of household members (excluding parents) 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. For 2021 federal income tax return filers, additional income-related information to be verified includes adjusted gross income, U.S. income tax paid, untaxed IRA distributions, untaxed pensions, education credits, IRA deductions, and tax-exempt interest income. Income earned from work must be verified for non-filers of U.S. income tax returns. The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA®. In most cases, no further documentation is needed to verify 2021 income information if IRS DRT information was not changed by the FAFSA® filer and no amended return was filed.

For Federal Pell Grant eligible students whose application has been selected for verification, verification must be completed by a deadline published annually in the Federal Register (generally in September following the academic year), or no later than 180 days after the last day of enrollment during the academic year, whichever date comes first. Verification must be completed for campus-based (Federal Supplemental Educational Opportunity Grants (SEOG) and Federal Work-Study) and Federal Direct Loan eligible students by the last day of enrollment during the academic year. Failure to complete verification will result in cancelation of Federal Student Aid. If a FAFSA® transaction is selected for verification after aid eligibility has already been made and/or disbursed and requested verification documents are not provided, any undispursed aid will be canceled. No additional federal funds will be disbursed until verification has been completed. If verification causes a change in the student’s eligibility for Federal Student Aid funds, the student will be notified via e-mail that their aid has been modified. The student may review her/his modified financial aid eligibility by accessing her/his financial aid record through the Student Financial Aid Portal.