Important Information about Federal Verification and Instructions for Completing the Federal Verification Worksheet - Independent 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)
List all household members. Include the following:

- **Yourself**.
- **Your spouse** if you are married.
- **Your or your spouse’s children**, if you or your spouse will provide more than half of the child’s 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** only if they now live with you or your spouse and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

For all household members, include the **Full Name, Age, and Relationship**. If more space is needed, attach a separate page with the requested information for the additional household members.

List all household members but include college information only for those household members meeting the following requirements. **Include the name of the college, undergraduate/graduate level, and half-time/full-time status** 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. “Half-time” means a minimum of 6 credit hours (or 12 weekly clock hours at schools not using credit hours).

Step 3 – Student’s Tax Filing Status – Calendar Year 2021

Check **NO** if you and your spouse, if included in the household, 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 and, if included in the household, your spouse’s employers and the amount earned from each employer in 2021. Attach copies of all 2021 IRS forms W-2 issued by employers to you and to your spouse if included in the household. 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 (and spouse, if appropriate) 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 (and spouse if appropriate), then the student (and spouse if appropriate) must send a copy to Student Financial Aid along with the student’s full name and Wake Forest Student ID#.

Check **YES** if you or your spouse, if included in the household, filed a 2021 U.S. federal income tax return, or if you or your spouse 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 (and spouse if appropriate), then the student (and spouse if appropriate) 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 the information reported on it is complete and correct. The student and spouse, if married, must sign and date.

Submit 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.
Your federal student aid application (FAFSA®) has been selected by the U.S. Department of Education for its federal verification process. For independent students, information to be verified relates to you and your spouse, if married. Please note carefully the documentation required to verify this information, listed above. 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 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 (DRT) that is part of the FAFSA®. In most cases, no further documentation is needed to verify income 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 complete 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 determined and/or disbursed, and requested verification documents are not provided, any undisbursed 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 receive a revised aid notification via e-mail. The student may review her/his modified financial aid eligibility by accessing her/his financial aid record through the Student Financial Aid Portal.