



U.S. Department
of Education

INDEPENDENT 2023-2024 VERIFICATION WORKSHEET FEDERAL STUDENT AID PROGRAM



MOUNT ST. JOSEPH
UNIVERSITY

Your application was selected for review in a process called verification. The law says that, before awarding federal aid, we have the right to ask you to confirm information reported on your Free Application for Federal Student Aid (FAFSA) using this worksheet and other required documents. If there are differences, your FAFSA information will be corrected. Authority to request and review information is provided under the financial aid program rules (34 CFR, Part 686). More info: <https://www.msj.edu/tuition-aid/policies-rules-regulations/verification/>

Notice About Income Verification: Income information for tax filers must be matched with data on file with the Internal Revenue Service (IRS). See page 2. As such, persons who have not filed their 2021 taxes* will not be able to complete verification until they have filed and their tax information is available from the IRS. Availability of information for online IRS Data Retrieval or IRS Tax Return Transcripts can take up to 2 weeks of filing taxes electronically and up to 8 weeks following paper tax filing.

*Persons filing a tax deadline extension will have to complete the verification process now and again after filing taxes.

You must complete and sign this worksheet

Non-Scholarship aid will not be available until the verification process, as outline on this worksheet, is complete. Preliminary Awards are estimates of eligibility. Any delay can cause the loss of eligibility or limited aid sources. Failure to complete verification prior to the last day of enrollment can result in total loss of eligibility.

A. Student Information

Check one: Incoming Freshman or Transfer Student Continuing Student

Last Name	First Name	M.I.	MSJ Student ID # (required for completion)
Address (include apt. # if applicable)			Date of Birth
City	State	Zip	Phone Number (include area code)

B. Family Information

List the people in your parent(s) household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if (a) you will provide more than half of their support from July 1, 2023 through June 30, 2024, or (b) the child(ren) would be required to provide your information when completing a FAFSA.
- Other people if they now live with you and you provide more than half of their support. You must continually provide more than half of their support through June 30, 2024.

Provide the names of all household members. Include the name of the college for any household member who will be attending college at least half-time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program.

If you need additional space, attach a separate page.

Full Name	Age	Relationship	College/University	Will be enrolled at least half-time?
Bill Miller (example)	18	Brother	State University	Yes
		Self	Mount St. Joseph University	

Important Income Information for Tax Filers

IRS DATA RETRIEVAL: Best way to verify income is to use the IRS Data Retrieval Tool (IRS DRT) within FAFSA.

- Go to StudentAid.gov, log into your FAFSA record, select “Make FAFSA Corrections”, and navigate to the Student/Parent Financial Sections
- If eligible to complete the process, use the IRS DRT to transfer 2021 IRS income tax information to the FAFSA for Student and/or Parent.
- When using the IRS DRT, do not modify income after transferring into the FAFSA. If modified, Transcript option will be required

IRS TAX RETURN TRANSCRIPT: If you are unable, or choose not, to use the IRS DRT, an IRS Tax Return Transcript will be required.

- Go to *IRS.gov* and use the “Order a Return or Account Transcript” link or call 1-800-908-9946.
- Make sure to request a 2021 **TAX RETURN TRANSCRIPT**.
- SSN, date of birth, and address used on the taxes needed for each tax filer when requesting. IRS will only send transcript to address on file
- Married persons filing separate tax returns (or newly single who filed jointly) must use Transcript option to request tax information for both.
- Transcripts must be submitted with this verification worksheet.

IRS TAX RETURN: If you did not use the IRS DRT or provide a tax return transcript, a **signed** copy of your filed 2021 taxes including schedules is required.

C. Student Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page, and check only **one** of the boxes.

- IRS DRT in FAFSA on the Web was used to retrieve and transfer IRS income information for the student (either on initial or corrected FAFSA). No modifications were made to income data.
- Student unable, or chooses not, to use IRS DRT. 2021 IRS Tax Return Transcript or **signed** 2021 Federal Tax Return(s) including schedules is attached.
- Student filed an amended return. 2021 IRS Tax Transcript *and* copy of signed 2021 1040X are attached.
- Student attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below. *

2. **TAX RETURN NON-FILERS:** Complete this section if student will not file and is not required to file a 2021 income tax return with the IRS.

- Student not employed; no earned income in 2021
- Student employed and completed info. Every employer, even if they didn't issue a W-2, must be listed. W-2s must be provided if issued.

Employer's Name	2021 Income	W-2 Issued?

E. Certification and Signatures

By signing this worksheet, I certify that all information reported is complete and correct. At least one parent must sign.

Student Signature

Date

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

Do not mail this worksheet to the U.S. Department of Education. Mail, fax, or bring to Mount St. Joseph University. Keep a copy for your records.

*Extension filing will require the completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to Mount St. Joseph University.

**Office of Student Administrative Services
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Phone – (513) 244-4418
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