

2022-2023 Independent Verification Worksheet – Completion Guide

Please use this guide to help you complete the required 2022-2023 Verification Worksheet.

Step 1: Student Information

Fill in personal information as directed.

Step 2: Household Information

Use the table to indicate all members of your family household. This should include the student, the student's spouse, the student's children, and any other members of the household for which the student provides more than 50% of their monetary support. Also indicate whether each household member will be enrolled in college at least half-time during the 2022-2023 school year.

Step 3: Student Marital Status

Select the applicable marital status for the student. Unless "single" is the status selected, indicate the marital status date. Leave blank if "single."

Step 4: Student Tax Filing Status for calendar year 2020

If the student filed a 2020 tax return, select the appropriate box under "Option 1."

If the student did not file a 2020 tax return, select the appropriate box under "Option 2."

Step 5: Certifications and Signatures

Sign and date. Both the student and spouse (if applicable) will need to sign and date the form. ***Do not submit any additional documents containing Personally Identifiable Information, such as a social security number, via email.***

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Step 3: Student Marital Status

Student Marital Status: ___ Single ___ Married/Remarried ___ Separated ___ Divorced/Widowed
Student Marital Status Date (if not Single): ____/_____
MM YYYY

Step 4: Student Tax Filing Status for calendar year 2020: Please complete Option 1 or Option 2.

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2019 or had a change in marital status after December 31, 2020.

Instructions: Complete this section if the student and spouse filed or will file a 2020 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at studentaid.gov.* In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Option 1: Student filed a 2020 IRS Tax Return: Please select an option below.

Check the box that applies:

The student has used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.

The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student's FAFSA.

The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2020 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return. Select an option below:**

___ Check here if a **2020 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** is provided.

___ Check here if a **2020 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** will be provided later.

*If the student and spouse filed separate 2019 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** must be provided for each.

Option 2: Student was a Non-tax Filer for calendar year 2020: I certify that I did not, and am not required to file a 2020 U.S. federal tax return. Please select an option below.

The student and spouse were not employed and had no income earned from work in 2020.

The student and/or spouse were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2020 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	2020 Amount Earned	IRS W-2 Provided?

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2020 that indicates a 2020 IRS income tax return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of non-filing is provided.

___ Check here if confirmation of non-filing will be provided later

Step 5: Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student Signature

Date

Spouse Signature (Optional)

Date

Please return Verification Worksheet and all appropriate documentation to:

Ursinus College
Office of Student Financial Services
601 E. Main St.
Collegeville, PA 19426
Fax: 610-409-3662

DISCLAIMER: Do not email any documents containing Social Security numbers to our office – this is not a secure method to provide this information to us.