

2023-2024 Dependent Verification Worksheet – Completion Guide

Please use this guide to help you complete the required 2023-2024 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 your custodial parent(s)*, siblings, and any other members of the household for which your custodial parent(s) 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 2023-2024 school year.

*The custodial parent is the parent with whom the student primarily resides.

- If the student lives with both biological parents, both parents should include their information on this form.
- If the student lives with only one biological parent, the student should include only this parent's information.
- If the student lives with one biological parent and a stepparent, both the biological parent and stepparent's information should be included.

Step 3: Student Tax Filing Status for calendar year 2021

If the student filed a 2021 tax return, select the appropriate box under "Option 1."

If the student did not file a 2021 tax return, select the appropriate box under "Option 2."

Step 4: Custodial Parent(s) Information

Provide the name(s) of the custodial parent(s) with whom the student lives. If the custodial parent is married to someone other than the student's other biological parent, include their information as well. (See asterisk in Step 2 for further clarification.) If custodial parents are not married, do not include marital status date. Only select "Never Married/Single" if the student's biological parents were never married and the student currently resides with only one custodial parent.

Step 5: Parent Tax Filing Status for calendar year 2021

If the custodial parent(s) filed a 2021 tax return, select the appropriate box under "Option 1." If separate returns were filed between custodial parents, submit the requested tax information for both parents.

If the custodial parent(s) did not file a 2021 tax return, select the appropriate box under "Option 2."

Step 6: Certifications and Signatures

Sign and date. Both the student and one custodial parent 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.***

DO NOT SUBMIT THIS PAGE TO THE OFFICE OF STUDENT FINANCIAL SERVICES

Step 3: Student Tax Filing Status for calendar year 2021: Please complete Option 1 or Option 2.

Important Note: The instructions below apply to the student.

Instructions: Complete this section if the student filed or will file a 2021 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 2021 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 2021 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 2021 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 2021 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 **2021 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return**. **Select an option below:**

___ Check here if a **2021 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** is provided.

___ Check here if a **2021 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** will be provided later.

Option 2: Student was a Non-tax Filer for calendar year 2021: I certify that I did not and am not required to file a 2021 U.S. federal tax return. Please select an option below.

The student was not employed and had no income earned from work in 2021.

The student was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued to the student by their employer(s)]. List every employer even if the employer did not issue an IRS W-2 form.

Employer’s Name	2021 Amount Earned	IRS W-2 Provided?

Step 4: Custodial Parent(s) Information

Parent 1 Name

Parent 2 Name

Parent Phone Number

Parent Email Address

Parent Marital Status:

___ Never Married/Single (if selected, skip to Step 5) ___ Unmarried-Parents Live Together (if selected, skip to Step 5)

___ Married/Remarried ___ Divorced/Separated ___ Widowed

Parent Marital Status Date: ____/____/____
MM YYY

Step 5: Parent Tax Filing Status for calendar year 2021: Please complete Option 1 or Option 2.

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the parents filed or will file a 2021 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 2021 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

Option 1: Parent(s) filed a 2021 IRS Tax Return: Please select an option below.

Check the box that applies:

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2021 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return**. **Select an option below:**
 - Check here if a **2021 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** is provided.
 - Check here if a **2021 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** will be provided later.

* If the parents filed separate 2021 IRS income tax returns, the IRS DRT cannot be used, and the **2021 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** must be provided for each.

Option 2: Parent(s) was a Non-tax Filer for calendar year 2021: I certify that I did not and am not required to file a 2021 U.S. federal tax return. Please select an option below.

- Neither parent was employed, and neither had income earned from work in 2021.
- One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	2021 Amount Earned	IRS W-2 Provided?

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 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 6: Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

Student Signature (*typed signatures NOT accepted*)

Date

Parent Signature (*typed signatures NOT accepted*)

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.