



# 2023-2024 Verification Worksheet

Your application was selected for review in a process called "Verification". In this process we will be comparing information from your FAFSA with the information you and/or your parent(s) submitted to the IRS on your 2021 federal income tax return. If there are differences between the information you submitted on your FAFSA and your financial documents, we may need to make corrections electronically to your FAFSA application.

### What you must do

1. Provide student and parent financial and tax information by utilizing the FAFSA on the Web IRS Data Retrieval Tool (DRT). In most cases you can use the DRT within 3 weeks of electronically submitting your Federal Tax Return or 11 weeks after mailing a paper Federal Tax Return.
2. If student and/or parent are unable to utilize the IRS DRT you may submit a **signed** copy of your 2021 1040 form along with all applicable schedules: Schedule 1, Schedule 2, Schedule 3, and Schedule K1 (IRS Form 1065), or an official 2021 Tax Return Transcript.
  - Request the tax transcript from the IRS by calling 800-908-9946 or
  - You may submit your request online at <https://www.irs.gov/>. Click on "Get Your Tax Record" then choose whether you want to get it by mail or online. Be sure to request a tax **return** transcript for the tax year 2021, a tax account transcript is **not** acceptable documentation.
  - Availability of the transcript, from the date you file your tax return, is the same as the IRS DRT (see above). You should receive your transcript in 10 to 14 days.
  - A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. A copy of the tax account information issued by the relevant tax authority may be required under certain circumstances.
3. **Provide our office with copies of all student and parent 2021 W-2 forms.**
4. Complete and sign the worksheet --- student and parent.
5. Submit the completed worksheet, tax forms (if applicable), W-2 forms, and any other documents requested of you to: Roanoke College Financial Aid Office, 221 College Lane, Salem, VA 24153. You may also fax these documents to our office at 540-375-2267 or email them to [finaid@roanoke.edu](mailto:finaid@roanoke.edu). **Do not mail this form to the Department of Education.** Contact our office at 540-375-2235 if you have questions.

## A. Student Information

|                            |       |          |                                  |
|----------------------------|-------|----------|----------------------------------|
| Last                       | First | Middle   | Social Security Number           |
| Address (include apt. no.) |       |          | Date of birth                    |
| City                       | State | Zip Code | Phone Number (include area code) |

## B. Family Information

List the people in your *parent(s)*' household, including:

- Yourself (even if you don't live with your parents);
- Your parent(s) (including stepparent);
- Your parents' other children (even if they don't live with your parent), if either of the following is applicable:
  - Your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024 or,
  - The children would be required to provide parental information when applying for Federal Student Aid
- Other people if they live with your parent(s) now and your parent(s) provide more than half of their support. (*In order to include other people in your household size, your parent(s) must continue to provide more than half of their support from July 1, 2023 through June 30, 2024.*)

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending 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 more space, attach a separate page.

| Full Name | Age | Relationship | College         |
|-----------|-----|--------------|-----------------|
|           |     | Self         | Roanoke College |
|           |     |              |                 |
|           |     |              |                 |
|           |     |              |                 |
|           |     |              |                 |

**C. Student's Income and Tax Information** - Check only one box below.

- I have utilized the FAFSA IRS Data Retrieval Tool (DRT) AND did not change any of the information that was transferred.
- I will submit a correction to the FAFSA and utilize the IRS DRT by \_\_\_\_\_ (date). I realize that I must not change any of the information that is transferred.
- I am unable or choose not to use the IRS DRT and will instead provide a 2021 IRS Tax Return Transcript by \_\_\_\_\_ (date). (See instructions in step 2 of "What you must do" on page 1 of this form). Or a **signed** copy of my 2021 1040 form and all applicable schedules: Schedule 1, Schedule 2, Schedule 3, and Schedule K-1 (Form 1065)
- I will not file, and am not required to file, a 2021 Federal Tax Return. (Report Income in C-2 below and provide **all** W-2s)

C1. Verification of untaxed income (See Question 44 of the FAFSA for additional explanation). **If an item does not apply, enter 0.**

| Sources of Untaxed Income |   | 2021 Amount | Sources of Untaxed Income |   | 2021 Amount |
|---------------------------|---|-------------|---------------------------|---|-------------|
| a.                        | Payments to tax deferred pension and retirement savings plans including, but not limited to, amounts reported on W-2 (W-2 box 12 a-d codes D,E,F,G,H,S) | \$          | b.                        | Tax exempt interest income - 1040 line 2a | \$          |
| c.                        | Untaxed portions of pensions and/or IRA distributions - 1040 lines (4a + 5a) minus (4b + 5b) Exclude rollovers  | \$          | d.                        | Other - (Please describe)                 | \$          |

C2. Verification of additional financial information - *If you did not file and are not required to file a 2021 Federal Income Tax Return, list below your employer(s) and any income received in 2021.*

**You must supply:**

- Copy of all relevant W2s, or
- Wage and Income transcript, or equivalent document

| Sources | Total 2021 Income |
|---------|-------------------|
|         | \$                |
|         |                   |

**D. Parent(s)' Income and Tax Information** - Check only one box below.

- My parent(s) utilized the IRS Data Retrieval Tool (DRT) AND did not change any of the information that was transferred.
- I will submit a correction to the FAFSA and utilize the IRS DRT for my parent(s) by \_\_\_\_\_ (date). I realize that we must not change any of the information that is transferred.
- My parent(s) are unable or choose not to use the IRS DRT, and instead will provide the school with a 2021 IRS Tax Return Transcript, or will be provided by \_\_\_\_\_ (date). Or a **signed** copy of my parent(s) 2021 1040 form and all applicable schedules: Schedule 1, Schedule 2, Schedule 3, and Schedule K-1 (Form 1065).
- My Parents filed **separate returns** and cannot use the IRS DRT. 2021 IRS Tax Return Transcripts are provided for both parents, or 2021 IRS Tax Return Transcripts will be provided by \_\_\_\_\_ (date).
- My Parents filed **separate returns** and cannot use the IRS DRT. My parents will provide **signed** copies of their 2021 1040 forms and all applicable schedules: Schedule 1, Schedule 2, Schedule 3, and Schedule K-1 (Form 1065).
- My parent(s) will not file, and are not required to file, a 2021 Federal Tax Return (Report Income in D-2 below, provide **all** W-2s, and Verification of Non-filing)

D1. Verification of untaxed income (See question 92 of the FAFSA for additional explanation). **If an item does not apply enter 0.**

| Sources of Untaxed Income |   | 2021 Amount | Sources of Untaxed Income |   | 2021 Amount |
|---------------------------|---|-------------|---------------------------|---|-------------|
| a.                        | Payments to tax deferred pension and retirement savings plans including, but not limited to, amounts reported on W-2 (W-2 box 12 a-d codes D,E,F,G,H,S) | \$          | b.                        | Tax exempt interest income - 1040 line 2a | \$          |
| c.                        | Untaxed portions of pensions and/or IRA distributions - 1040 lines (4a + 5a) minus (4b + 5b) Exclude rollovers  | \$          | d.                        | Other - (Please describe)                 | \$          |

D2. Verification of additional financial information - *If your parent(s) did not file and are not required to file a 2021 Federal income tax return, list below their employer(s) and any income they received in 2021.*

**You must supply:**

- Copy of all relevant W2s, or a Wage and Income Transcript or equivalent document
- And a **Verification of Non-filing Letter** from the IRS or other relevant tax authority dated on or after October 1, 2022.

**\*This letter is required even if your parent(s) income was \$0.00 for 2021.**

| Sources | Total 2021 Income |
|---------|-------------------|
|         | \$                |
|         |                   |

**E. Signatures**

*Each person signing this form certifies that all the information reported on it is complete and correct.*

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Parent Date

**WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. If you need to make a correction to any information, please mark a line through it and initial the change. Do not use whiteout as it will invalidate the document.