



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 your spouse (if applicable) 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 application.

What you must do

1. Provide your and your spouse's (if applicable) tax and financial information by utilizing the FAFSA on the Web IRS Data Retrieval Tool (DRT). The DRT should be available within 3 weeks of electronically submitting your Federal Tax Return or 11 weeks after mailing a paper Federal Tax Return.
2. If you (and your spouse) 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 (Form 1065), or an official 2021 Tax Return Transcript.
 - Request a tax return transcript from the IRS by calling 800-908-9946
 - 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 or 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 2021 W-2's** for you and your spouse (if applicable).
4. Complete and sign this worksheet.
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. **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 household, including:

- Yourself and your spouse (if applicable) -Marital status should be as of the day you submit your FAFSA.
- Your children, if you will provide more than half of their support from July 1, 2023 through June 30, 2024 (even if they don't live with you).
- Other people if they live with you now and you provide more than half of their support. *(In order to include other people in your household size, you 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 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. Unmarried/Separated Student's Tax Return and Income Information - Check only one box below.

- I 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. (See instruction in step 2 of "What you must do" on page 1 of this form.)
- I am unable or choose not to use the IRS DRT and will instead provide 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 2021 Income in E-2 below, provide **all** W-2s, and Verification of Non-Filing)

D. Married Student's Tax Return and Income Information - Check only one box below.

*Married students who filed separate returns cannot use the IRS Data Retrieval Tool (DRT). You **must** request official 2021 IRS Tax return transcripts for both you and your spouse, if you both filed a tax return. (See instructions in step 2 of "What you must do" on page 1 of this form.) Or supply your and your spouse's signed 1040 form with applicable Schedules.*

- My spouse and I filed a joint return and utilized the IRS Data Retrieval Tool (DRT). I did not change any of the information transferred.
- My spouse and I filed a joint return and 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.
- My spouse and I filed a joint return and will provide a **signed** copy of our 2021 1040 form, and all applicable Schedules: Schedule 1, Schedule 2, Schedule 3, and Schedule K-1 (Form 1065), or provide a 2021 IRS Tax Return Transcript. (See instruction in step 2 of "What you must do" on page 1 of this form.)
- I filed a 2021 Federal Tax Return and am attaching a copy of my official 2021 IRS Tax Return Transcript or a **signed** 1040 with applicable Schedules. My spouse did not file and is not required to file a 2021 Federal Tax Return. (Report Spouse's 2021 Income in E-2 below, provide all W2s, and Verification of Non-filing)
- I am attaching a copy of my Spouse's 2021 IRS Tax Return Transcript or a **signed** 1040 with applicable Schedules. I did not file and am not required to file a 2021 Federal Tax Return. (Report your 2021 Income in E-2 below, provide all W2s, and Verification of Non-filing)
- My spouse and I filed separately and are unable to use the IRS Data Retrieval Tool. I am attaching copies of both 2021 IRS Tax Return transcripts.
- My spouse and I filed separately and are unable to use the IRS Data Retrieval Tool. I am attaching signed copies of both my and my spouse's 2021 1040 form and all applicable schedules: Schedule 1, Schedule 2, Schedule 3, and Schedule K-1 (Form 1065).
- Neither I nor my spouse filed a 2021 Federal Tax Return and we are not required to file one. (Report both of your 2021 incomes in E-2 below, provide **all** W-2s, and Verification of Non-filing for both).

E. Additional Sources of Income

E1. 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)	\$	c. Tax exempt interest income - 1040 line 2a	\$
b. Untaxed portions of pensions and/or IRA distributions - 1040 lines (4a + 5a) minus (4b + 5b) Exclude rollovers	\$	d. Other – (Please describe)	\$

E2. Verification of additional financial information - *If you and/or your spouse, if married, 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 and/or your spouse 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 or your spouse's income was \$0.00 for 2021.

Sources	2021 Income
	\$
	\$

F. Signatures

Each person signing this form certifies that all the information reported on it is complete and correct. If married, your spouse's signature is optional.

Student Date

Spouse Date

(V1, V5)

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.