

# 2023 - 2024 VERIFICATION STATUS 1 INDEPENDENT WORKSHEET

## A. Student's Information

First Name \_\_\_\_\_ M.I. \_\_\_\_ Last Name \_\_\_\_\_ Student ID Number \_\_\_\_\_  
 Address (include Apt. #) \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Primary Phone # \_\_\_\_\_ Secondary Phone # \_\_\_\_\_  
 Personal Email \_\_\_\_\_ Date of Birth \_\_\_\_\_

## B. Number of Household Members and Number in College

List below the people in the **student's household**. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2023, through June 30, 2024, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2024.

Include in the space below information about any household member, who is, or will be, enrolled **at least half time** in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024, and include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>	<i>Del Mar College</i>	

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

### C. Verification of 2021 Income Information for Student Tax Filers

Complete this section if the student and spouse (if married) **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 [FAFSA.gov](https://fafsa.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.

**Important Notes:** The instructions below apply to the student and spouse (if married) included in the household. Notify the financial aid office if the student and spouse (if married) filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021. If the student and spouse (if married) filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules must be provided for each.

**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 institution with a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules.
  - Check here if a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules **is provided**.
  - Check here if a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules **will be provided later**.

### D. Verification of 2021 Income Information for Student Nontax Filers

Complete this section if the student spouse (if married) **will not file and is not required** to file a 2021 income tax return with the IRS.

**Check the box that applies:**

- The student and spouse (if married) was not employed and had no income earned from work in 2021.
- The student and spouse (if married) was 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. It is **MANDATORY** to provide copies of all 2021 IRS W-2 forms issued to the student by their employers. List every employer even if the employer did not issue an IRS W-2 form.  
If more space is needed, provide a separate page with the student’s name and ID number at the top.

Employer’s Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain Verification of Non-filing (VNF) Letter from the IRS or other relevant tax authority and was unable to obtain the required documentation.

- Check here if the IRS Verification of Non-filing (VNF) Letter or a signed statement **is provided**.
- Check here if the IRS Verification of Non-filing (VNF) Letter or a signed statement **will be provided later**.

Student Name: \_\_\_\_\_ Student ID #: \_\_\_\_\_

## E. Verification of 2021 Income Information for Individuals with Unusual Circumstances

**Instructions:** Check the box that applies to the circumstance(s) listed below, if none apply leave blank.

### Individuals Granted a Filing Extension by the IRS

Student  Spouse

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2021, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2021; **and**
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation; **and**
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2021, **and/or**
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2021 tax account information.

### Individuals Who Filed an Amended IRS Income Tax Return

Student  Spouse

An individual who filed an amended IRS income tax return for tax year 2021 must provide the following:

- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS; **and**
- A 2021 IRS Tax Return Transcript that includes all of the income and tax information required to be verified; **or** a signed copy of the 2021 IRS Form 1040 and the applicable schedules that were filed with the IRS.

### Individuals Who Were Victims of IRS Tax-Related Identity Theft

Student  Spouse

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2021 income tax return and applicable schedules the individual filed with the IRS; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

### Individuals Who Filed Non-IRS Income Tax Returns

Student  Spouse

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Student Name: \_\_\_\_\_ Student ID #: \_\_\_\_\_

## F. Certifications and Signatures

The student (and, if married) signing below certifies that all 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's Signature (Required) \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature (Optional) \_\_\_\_\_ Date \_\_\_\_\_

## How to Obtain an IRS Tax Return Transcript, Verification of Non-filing (VNF) Letter, or Wage & Income Statement

- **Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
- **Request an Appointment with a Local IRS Representative** – 1-844-545-5640

555 N. Carancahua St.  
Corpus Christi, TX 78401  
Monday – Friday 8:30AM - 4:30PM