

Student Financial Services

STANDARD VERIFICATION WORKSHEET V1

2023 - 2024

Due to the information provided in your 2023-2024 Free Application for Federal Student Aid (FAFSA), your form was selected for review in a process called Verification. The FAFSA will be compared to the information on this worksheet, along with any other required documents. If there are inconsistencies, the FAFSA may need to be corrected. If you are a dependent student, your parent(s) must complete and sign this worksheet before submitting it (with all other requested documents) to the College's Office of Student Financial Services.

This process takes 14 business days from the time that all requested documents are received (i.e., this does not include any time for necessary corrections). Please be advised that it may take longer during times of peak activity at the College (i.e., the beginning of the fall and spring). For this reason, it is essential to check the College's academic calendar for the Financial Aid Guaranteed Processing Deadline during the term of enrollment. Forms are located online at: polk.edu (click on Admission & Aid, then Financial Aid, and then Forms [left tab]). Questions about verification should be directed to the Office of Student Financial Services as soon as possible to prevent delays in receipt of financial aid. _____Student ID:_____ Student Name (Please Print): Contact Phone Number: _____ ______ Term:______ A. Dependency Status and Family Information: (Please read, select the applicable choice, and fill in the table). Independent: Students are considered independents if they are married, have a child that they must take care of 51% of the year, serve in the military, are veterans, or are qualified unaccompanied youth. Please include in the table below: (Please do not use abbreviations). • Your spouse/partner's name, age, and dependent child(ren) that you will provide more than half of the support for, including if the child(ren) would be required to provide parental information when applying for financial aid. · List other people only if they live with you and your spouse now, and if you and/or your spouse provide more than half of their support, and you will continue to provide it from July 1, 2023, through June 30, 2024. • Include the name of the college attended by each household member who has already earned a high school diploma/GED and who will be enrolled as at least a half-time student from July 1, 2023, through June 30, 2024. Dependent: A dependent student who is required to provide parental data on the FAFSA. This includes students who do not live with their parents, and do not fall in the following categories: married, financially supporting a child at 51% (from July 1, 2023, through June 30, 2024), those serving in the military, veterans, or qualified unaccompanied youths. Please include in the table below: (Please do not use abbreviations). • The names and ages of parents/stepparents who provide more than half of your financial support. • Your parents' or stepparents' dependent children, if your parents/stepparents will provide more than half of their support, or if the children would be required to provide parent information when applying for financial aid. • List other people only if they live with your parent(s), and if your parent(s) provide more than half of their support, and they will continue to provide this support from July 1, 2023, through June 30, 2024. • Include the name of the college attended by each household member who will be enrolled as at least a half-time student from July 1, 2023, through June 30, 2024. Parent(s) cannot be included in the number in college. First, Last Name: **Relationship: Full College Name:** Student (YOU):___ Self **Polk State College**



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B. Tax Return/Income Verification: (Please check the line that applies).

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA and is available at www.studentaid.gov. If the IRS Retrieval Data Tool was not used in the application, the student should log into the FAFSA, click on "Make FAFSA Corrections," then on the *Financial Information* section. This section provides instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2021 income tax information into the FAFSA. Please be advised that individuals who used the "Married, Filing Separately" option to file taxes cannot use this tool.

| Student/Spouse (if m | narried): | | | | |
|--|--|--|--|--|--|
| | I have used the IRS Data Retrieval Tool to transfer my 2021 Income Tax Return information. (Go to Section D) | | | | |
| I did not use the IRS (Go to Section D) | Data Retrieval Tool. Attach a copy of the | 2021 Tax Transcript (www.irs.go | v) or a <u>signed</u> 2021 Tax Return. | | |
| • | ot, will not, and am not required to file a 20 | 021 Income Tax Return. (Go to S e | ection C) | | |
| | . Tax Return. Attach a signed copy of the 1 | | | | |
| signed 2021 IRS 104 | xtension of the 2021 tax year and have att 10 Form, 2021 W-2 Forms, and a signed stancome tax paid for 2021. | | | | |
| IRS tax transcripts t | ntity theft and have attached the 2021 Ta hat include all income and tax information om the tax filer. (To obtain documents or | n that require verification within | the process, as well as a signed and | | |
| Parent(s)/Stepparent: | | | | | |
| I/We have used the | IRS Data Retrieval Tool to transfer 2021 In | ncome Tax Return information. (0 | Go to Section D) | | |
| | Data Retrieval Tool. Attach a copy of the 2nd the second page of the <i>Tax Return Form</i> | · · · | v) or a signed 2021 Tax Return. The | | |
| | /e did not, will not, and am/are not requir | | · · · · · · · · · · · · · · · · · · · | | |
| | 2021 Tax Return. Attach a signed copy of t xtension for the 2021 tax year and have a | - | | | |
| | rm, W-2 Forms, and a signed statement (if | • • | • • | | |
| the U.S. income tax paid | | sen employed, certifying the A | ajusticu Gross meome (AGI) una | | |
| I am/We are victim(| s) of identity theft and have attached the | Tax Return Database View Tran | script (TRDBV) from the IRS or any | | |
| | ripts that include the income and tax infornt from the tax filer. (To obtain document | | | | |
| C. Non-Tax Filers Income | Information: (Please read below and f. | ill in the box). | | | |
| | e in 2021 and were not required to file a 2 e: In most situations, a total income above | - | | | |
| | ments such as <i>W-2 Forms</i> and/or 1099 For nent that includes the source of income, t | | | | |
| If you do not have a 109 paid, and the Adjusted | 99 Form and did not work, please provide a Gross Income (AGI). | a signed statement that includes | your source of income, total tax | | |
| If for any reason the information you poleave this section blank. If an area is no | rovide is questionable based on professional jot applicable, enter "N/A." | udgment, the College may require a | dditional documentation. Please do not | | |
| Employer Name/Source of Income | <u>W-2 and/</u> or 2021 1099 forms attached? | Student 2021 Annual Amount | Parent(s)/Stepparent(s) Annual Amount | | |
| (Please check.) 1 | Yes No | | | | |
| 2 | | | | | |
| 3 | | | | | |
| <u> </u> | | <u> </u> | | | |

<u>Note:</u> In most situations, a total income of \$12,550 or more requires that a tax return be filed. If this applies, please do not complete this section. Instead, submit a 2021 Tax Return Form to the IRS, and then bring your signed 2021 Tax Return Form to the College to complete the verification process.

_Yes___No



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D. Untaxed and Investment Income: (Do not leave this section blank.)

Even if the student and parent(s)/stepparent have situations that pertain to the above sections, all individual(s) must complete this section in its entirety. (Attach all relevant 2021 *W-2 Forms* and/or 1099 Forms.)

| Sources of Untaxed Income | Student (2021 Amount) | Parent(s)/Stepparent (2021 Amount) |
|---|-----------------------------|------------------------------------|
| Do you have an IRA Distribution from your IRS Form, 1040, or 1040A rollover amount? | YES: NO: | YES: NO: |
| Do you have a pension distribution from your IRS form, 1040, or 1040A rollover amount? | YES: NO: | YES: NO: |
| Do you have other 2021 untaxed income or benefits not mentioned on this form? List this income in Section C of this form. | YES: NO: | YES: NO: |
| itudent Signature Date | Parent Signature (if depend | ent) Date |

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Polk State College is committed to equal access/equal opportunity in its programs, activities, and employment. For additional information, visit polk.edu/compliance.