

Please see <https://prod.wp.cdn.aws.wfu.edu/sites/187/2022/10/WFU-Verif-Instructions-Independent-Student-2324.pdf> for Independent Student Verification Worksheet Instructions.

Step 1 – Student Information

Last name	First name	M.I.	WFU Student ID #
Address (include apt. no.)			Date of Birth (mm/dd/yyyy)
City	State	Zip Code	Phone number (with area code)

Step 2 – Household Information (Including all household members, whether or not they are enrolled in college.)

In the chart below include the **Full Name, Age, and Relationship** of:

- **Self.**
- Your **spouse**, if you are married.
- Your **children**, if any, if you will provide more than half of their support from July 1, 2023 through June 30, 2024 or if the child would be required to provide your information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if they do not live with you.
- **Other people** only if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

Provide college information for those students attending at least half-time during 2023-2024 in a program leading to a degree, diploma, or certificate.

Full Name of Household Member	Age	Relationship	Name of College	Undergraduate/ Graduate Level	Half-Time/ Full-Time
		Self	Wake Forest University		

Step 3 – Student’s Tax Filing Status – Calendar Year 2021

Have you or will you, or your spouse, be required to file a 2021 U.S. federal income tax return? Notify the financial aid office if you or your spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

_____ YES

_____ NO Complete Student Non-Tax Filer’s Statement **AND** submit a Verification of Non-filing Letter. Request a Verification of Non-filing letter for tax year 2021 at ([irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them](https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them)). When the letter is received by the student (and spouse if appropriate), then the student (and spouse if appropriate) must send a copy of it to the Student Financial Aid office along with the student’s full name and WFU ID#.

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web at 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 by the FAFSA filer.

Please see the reverse side for additional questions and information.

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)**.

Important Information about Federal Verification

Your federal student aid application (FAFSA) has been selected by the U.S. Department of Education for verification. For dependent students, information to be verified relates to the student and to their parent(s). Please note carefully the documentation required to verify this information listed below. You must complete and return the Verification Worksheet and all other required documentation to avoid cancellation of your Federal Student Aid.

For 2023-2024, information to be verified includes number of household members; number of household members (excluding parents) who will be enrolled at least half-time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023 and June 30, 2024. For 2021 federal income tax return filers, additional income-related information to be verified includes adjusted gross income, U.S. income tax paid, untaxed IRA distributions, untaxed pensions, education credits, IRA deductions, and tax-exempt interest income. Income earned from work must be verified for non-filers of U.S. income tax returns.

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 by the FAFSA filer.

For Federal Pell Grant eligible students whose application has been selected for verification, verification must be completed by a deadline published annually in the *Federal Register* (generally in September following the academic year), or no later than 180 days after the last day of enrollment during the academic year, whichever date comes first. Verification must be completed for campus-based (Federal Supplemental Educational Opportunity Grants (SEOG) and Federal Work-Study) and Federal Direct Loan eligible students by the last day of enrollment during the academic year. Failure to complete verification will result in cancelation of Federal Student Aid.

If a FAFSA transaction is selected for verification after an award has already been made and/or disbursed and requested verification documents are not provided, any undisbursed award will be canceled. No additional federal funds will be disbursed until verification has been completed.

If verification causes a change in the student's eligibility for Federal Student Aid funds, the student will receive a revised aid notification via email. The student may review his modified financial aid eligibility by accessing his financial aid record through the Student Financial Aid Portal.

Certification

Each person signing this worksheet certifies that all the information reported on it is complete and correct. The student and spouse, if married, must sign and date.

Wake Forest University cannot accept electronic signatures.

Student's Signature

Date

Spouse's Signature

Date