



**Office of Student Financial Services**

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**2023-2024 Dependent Student Verification Worksheet**

Student Name: \_\_\_\_\_

SMC ID# \_\_\_\_\_

**Household Information:**

Please list the name, age and relationship to the student of each member of the parents' household. Enter the name of the college at which members of the household will be enrolled at least half-time in a degree or certificate program between July 1, 2023 and June 30, 2024. Always include yourself. Do not include your parents. Do not include siblings who are in U.S. military service academies.

Include the following people in the parents' household:

- You (the student) even if you do not live with your parents;
- Your parent(s) including a step-parent;
- Your parents' other children if your parents will provide more than half of their support between July 1, 2023 and June 30, 2024 or if they would be required to provide parental information if completing a 2023-2024 FAFSA;
- Other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support between July 1, 2023 and June 30, 2024.
- If your parents are divorced or separated and do not live together, include only the parent whom you lived with the most in the year leading up to the date you filed your 2023-2024 FAFSA or, if you lived with both parents equally, the parent who provided more financial support in the year leading up to the date you filed your 2023-2024 FAFSA. If that parent is remarried, include his or her spouse.
- If your legal (biological, adoptive or as determined by your state) parents are not married but live together, include both parents and answer all questions about both parents.

Full Name	Age	Relationship	Name of College/University (If at least half-time 2023-2024)
		<i>Self</i>	<i>Saint Michael's College</i>

**\*\*CONTINUE TO PAGE 2\*\***

**Student Tax Filing Status & Income from Work:** Check one box below that applies to you and provide any requested information.

- I have filed or will file a **2021** U.S. or foreign income tax return (IRS Form 1040, 1040PR or similar foreign tax return). Please do one of the following:
- Update your 2023-2024 FAFSA with your unaltered **2021** IRS tax return information using the FAFSA-IRS Data Retrieval Tool **OR**;
  - Provide a copy of your **SIGNED 2021** IRS Tax Return or Tax Return Transcript and all **2021** W-2 Statements

- I have not, will not and am not required to file a **2021** US or foreign income tax return, but I did earn income from work in 2021. In the table below, list the sources and amounts of all income earned from work in calendar year **2021** (include SMC income) and provide **2021** W-2 Statements.

Name of Employer (Only list earnings if you worked but did NOT file a 2021 tax return)	Amount Earned in 2021
	\$
	\$
	\$
Total <b>2021</b> Earnings	\$

- I did not earn any income from work in **2021**. I have not, will not and am not required to file a **2021** income tax return. Do not enter any information above, please leave the table blank. No documents are required in this scenario.

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**Parent Tax Filing Status & Income from Work:** Check one box below indicating parents' 2021 status and provide all requested information.

- I/we have filed or will file a **2021** U.S. or foreign income tax return (IRS Form 1040, 1040PR or foreign tax return). Please do one of the following:
- Update your 2023-2024 FAFSA with your unaltered **2021** IRS tax return information using the FAFSA-IRS Data Retrieval Tool **OR**;
  - Provide a copy of your **SIGNED 2021** IRS Tax Return or Tax Return Transcript and all **2021** W-2 Statements

- I/we have not, will not and am not required to file a **2021** US or foreign income tax return, but did earn income from work in 2021. Please do both of the following:
- Provide an IRS Verification of Non-Filing Status dated on or after **October 1, 2022** AND;
  - In the table below, list the sources and amounts of all income earned from work in calendar year **2021** and provide **2021** W-2 Statements.

Name of Parent With Earnings	Name of Employer	Amount Earned in 2021
Total <b>2021</b> Earnings		\$

- I/we did not earn any income from work in **2021**. I/we have not, will not and am not required to file a **2021** US or foreign tax return. Provide an IRS Verification of Non-Filing Status dated on or after **October 1, 2022**. Do not enter any information in the table above.

**CERTIFICATION:** I certify that all the information reported on this form is true, complete and correct. I understand that any false statements could be cause for denial, reduction, withdrawal or repayment of financial aid.

Please print and sign before submitting. We CANNOT accept digital signatures.

**WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

## Instructions for Obtaining IRS Tax Return Transcripts

### FAFSA IRS Data Retrieval Tool

★ Recommended ★

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your 2023-24 FAFSA.

In many cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to [www.fafsa.gov](http://www.fafsa.gov) and Login.
- Select "Make FAFSA Corrections"
- Select the Financial Information tab & look for the "Link to IRS" option. Be sure to enter your address exactly as it appears on your 2021 Federal Income Tax Return.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



**IMPORTANT: If you use the Data Retrieval Tool to link your tax information, please do not submit paper copies of Tax Return Transcripts unless requested by Student Financial Services.**

### 2021 IRS Tax Return Transcripts

#### Online Request

- Go to [irs.gov](http://irs.gov) and select "Get Your Tax Record"
- Select "Get Transcript Online" or "Get Transcript by Mail".
- "Get Transcript Online" requires authentication and creation of an [irs.gov](http://irs.gov) account.
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Make sure your request is for your calendar year 2021 Tax Return Transcript

**Telephone Request** - 1-800-908-9946

**Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

**\*\*There are several types of IRS Tax Transcripts. Be sure to request a *Tax Return Transcript*\*\***

### 2021 IRS Verification of Non-Filing

**If requested, provide an IRS Verification of Non-Filing Status Letter dated on or after October 1, 2022.**

- Download IRS Form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Complete lines 1-4 following the instructions on the last page of the form.
- Do **NOT** list Saint Michael's College on line 5. Have the Verification of Non-filing Status Letter sent to you.
- Line 7: Check the box on the right hand side for Verification of Non-filing
- Line 9: Enter 12/31/2021 in the year or period requested field.
- Sign and date the form.
- Mail or fax the completed IRS Form 4506-T to the address/fax number provided on the last page of the form for your filing address.
- Verification of Non-Filing Status should be mailed within 5 to 10 business days after successful receipt and validation by the IRS.
- Upon receipt, make a copy for your records and send the original, to Student Financial Services. Please be sure to note the student's name and SMC ID on the Verification of Non-filing Status.