



Office of Student Financial Services

One Winooski Park, Box 4

Colchester, VT 05439

Tel. 802-654-3243

Fax: 802-654-2591

E-mail: finaid@smcvt.edu

2023-2024 Independent Student Verification Worksheet

Student Name: _____

SMC ID# _____

Household Information:

Please list the name, age and relationship to the student of each member of your 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 household members who are in U.S. military service academies.

Include the following people in your household:

- Yourself;
- Your spouse;
- Your children if you will provide more than half of their support between July 1, 2023 and June 30, 2024;
- Other people 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 between July 1, 2023 and June 30, 2024.

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

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Tax Filing Status and Income from Work: Check only one box below that applies to you (and your spouse's) **2021** tax filing status and provide any requested information.

- I/we 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 process **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 I did earn income from work in 2021. Please do **both** of the following:
- Provide an IRS Verification of Non-filing Status Letter 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** (including SMC income) and provide **2021** W-2 Statements.

Name of Wage Earner	Name of Employer	Amount Earned in 2021
Total 2021 Earnings		\$

- Check here only if neither you nor your spouse (if applicable) earned any income from work in **2021** and were not required to file a **2021** tax return. You must provide an IRS Verification of Non-Filing Status Letter dated on or after **October 1, 2022**. Do not enter any information in the table above, leave it blank.

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

Spouse Signature

Spouse Printed Name

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 2021 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 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 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 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.