

The U.S. Department of Education has selected your 2023-24 Free Application for Federal Student Aid (FAFSA) for verification, requiring that we check the accuracy of certain information reported on your FAFSA. Our office will compare your FAFSA with the information on this worksheet and with other required documents, making corrections if needed. You and at least one parent (if you are a dependent student) whose information was reported on the FAFSA must complete and sign this worksheet, attach any required documents, and submit all to the UE Office of Student Financial Services within 45 days of notification. Your 2023-24 financial aid is not final and will not be disbursed until this is completed. We may ask for additional information after you return this form. Verification policy is available at evansville.edu/student-financial-services/policies.cfm.

- Parents are defined as the parent(s) (and stepparent, when applicable) with whom you lived the majority of the time during the twelve months prior to filing for financial aid.
- If more space is needed, attach a separate page with the student's name and UE student ID at the top.

Student's Last Name	Student's First Name	Student's M.I.	UE Student ID Number
() -	() -		
Student's Home Telephone	Student's Alternate or Cell Phone Number		Student's Email

A. Student's Family Household Information

Complete the chart below by listing those who will be in your household (see the dependent student and independent student sections below for who to include) between July 1, 2023, and June 30, 2024.

Full Name	Age	Relationship to You	Attending College in 2023-24*
1. You:		Self	University of Evansville
2.			
3.			
4.			
5.			
6.			
7.			

Check this box if there are more than **seven** family members. Attach a list of these people, providing the same information as requested above for each person.

*Include the name of the college for any household member, 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.

Dependent Student: Include those listed below.

- **Parents:** If your parents are separated or divorced, list only the parent (and stepparent, if applicable) with whom you live.
- **Siblings:** Those who receive more than half of their support from your parents or who would be required to provide your parents' information on their FAFSA, even if they no longer reside in your household.
- **Others:** Those who now live with and receive more than half of their support from your parents and will continue to receive this support between July 1, 2023, and June 30, 2024, even if they are not claimed on your parents' tax return.

Independent Student: Include those listed below.

- **Yourself**
- **Spouse:** If you are married.
- **Children:** Those who receive more than half of their support from you even if they are not claimed on your income tax return.
- **Others:** Those who now live with and receive more than half of their support from you and will continue to receive this support between July 1, 2023, and June 30, 2024, even if they are not claimed on your tax return.

B. Student's Income Information

Did you, the student, (and, if married, spouse) file a 2021 Tax Return?

If yes – Check one option indicating how you will provide tax data. *(Do not complete wages chart.)*

- IRS Data Retrieval Tool (recommended) (fafsa.gov)
- 2021 IRS Tax Return Transcript (irs.gov)
- Signed copy of 2021 federal tax return and all applicable schedules.
- Amended 2021 federal tax return (See Option 4 on page 3.)

If no – Check one option to indicate if wages were or were not earned.

- I/We **was/were not employed**, had no income from work in 2021, have not filed, and am not required to file a 2021 income tax return.
- I/We **was/were employed** in 2021 but will not, and am not required to file a 2021 income tax return. Listed below are the names of all my/our employers and the amount earned from each in 2021.

Please note: independent students who did not file a tax return are **also** required to complete IRS Form 4506-T and provide an IRS Verification of Non-Filing Letter.

Employer's Name <i>(Only complete chart if no tax return filed. Must provide W-2(s))</i>	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,041.17 (example)</i>

C. Parent's Income Information

Did your parent(s) file a 2021 Tax Return?

If yes – Check one option indicating how parent(s) will provide tax data. *(Do not complete wages chart.)*

- IRS Data Retrieval Tool (recommended) (fafsa.gov)
- 2021 IRS Tax Return Transcript (irs.gov)
- Signed copy of 2021 federal tax return and all applicable schedules.
- Amended 2021 federal tax return (See Option 4 on page 3)

If no – **Complete IRS Form 4506-T and provide IRS Verification of Non-Filing Letter.**

- Parent(s) **was not employed**, had no income from work in 2021, has not filed, and is not required to file a 2021 income tax return.
- Parent(s) **was employed** in 2021 but will not, and is not required to file a 2021 income tax return. Listed below are the names of all parent(s)' employers and the amount earned from each in 2021.

Employer's Name <i>(Only complete chart if no tax return filed. Must provide W-2(s))</i>	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$28,487.22 (example)</i>

D. Certification and Signatures

I/We certify that all of the information reported on this worksheet is complete and correct. The student and one parent (if dependent student) whose information was reported on the FAFSA must sign this worksheet. WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent/Spouse's Signature

Date

Return to:
University of Evansville
Office of Student Financial Services
1800 Lincoln Avenue • Evansville, Indiana 47722

Contact our office:
Phone: 812-488-2364 • Toll free: 800-424-8634
Fax: 844-433-7153
Email: studentfinancialservices@evansville.edu

CONFIRMING 2021 INCOME FOR INCOME TAX FILERS

When the FAFSA processor selects a student's FAFSA for verification, the college is obligated to check certain information about the household and family income before finalizing the student's financial aid. See options 1, 2, and 3 below for acceptable methods of verifying income for tax filers. See Option 4 for documentation required when an amended tax return is filed.

OPTION 1 – IRS DATA RETRIEVAL (Recommended)

The best way to verify income is by using the IRS Data Retrieval Tool on the web. This will overwrite income figures that had been manually typed into the FAFSA.

- Go to *FAFSA.gov* and log in to the student's FAFSA.
- Select "Make FAFSA Corrections."
- Navigate to the section for the financial information.
- Select "Already completed" from drop down for tax return completion status.
- Follow the instructions to "Link to the IRS."
- Enter address information when prompted and submit. (Must be exactly as is shown on tax return)
- Check option to accept terms and select "Transfer Now."

When this process is completed successfully, you will be returned to the FAFSA website. Line items transferred from IRS data retrieval will show "**Transferred from the IRS**".

After transferring the tax information, be sure to continue clicking "next" until student/parent can electronically sign and submit the correction. The UE Office of Student Financial Services will then receive a corrected version of the student's FAFSA confirming that the IRS Data Retrieval Tool was used successfully.

OPTION 2 – OBTAIN A TAX RETURN TRANSCRIPT FROM THE IRS

To obtain an IRS tax return transcript, go to *IRS.gov* and click on the "Get Your Tax Record" link or call 1-800- 908-9946. You can choose to "Get Transcript Online" or "Get Transcript by Mail." The first option allows you to immediately print or save a pdf version of your transcript, which you can either mail or fax to our office. Make sure to request the "**IRS tax return transcript**" and not the "IRS tax account transcript." You will need your social security number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2021 IRS tax return was filed). If parents are married but filed separate 2021 tax returns, 2021 IRS tax return transcripts must be submitted for each parent.

OPTION 3 – SIGNED TAX RETURN

If the IRS Data Retrieval Tool is unavailable, you may submit a **signed** copy of your 2021 tax return (1040 or 1040-SR) and all applicable schedules. If this is the selected method, please send via our secure fax line or by mail for security of data.

OPTION 4 – INDIVIDUALS WHO FILED AN AMENDED IRS INCOME TAX RETURN

An amended tax return is where a correction was made to your taxes **after having filed them**.

If an individual filed an amended IRS income tax return for tax year 2021, provide/complete the following:

A signed copy of the 2021 IRS Form 1040X, "Amended US Individual Income Tax Return," that was filed with the IRS **and one of the following**:

- Use the IRS Data Retrieval tool within the FAFSA, or
- A 2021 IRS tax return transcript, or
- A signed copy of 2021 federal tax return and all applicable schedules.

CONFIRMING 2021 INCOME FOR NON-FILERS

Provide all W-2s issued by employers for wages earned in 2021.

If W-2s are not able to be obtained by employer(s), you may request a wage and income transcript from the IRS, which is their version of your W-2. This may be requested by selecting option 8 on Form 4506-T.

Provide IRS Verification of Non-Filing Letter (Parents and Independent Students):

For **independent students** and **parents** who have not and are not required to file a 2021 income tax return, an IRS Verification of Non-Filing Letter for the 2021 tax year is required. You may obtain this by completing the **IRS Form 4506-T Request for Transcript of Tax Return** and selecting option 7, "Verification of Non-filing". This form is available through Financial Aid Self-Service and must be mailed or faxed to the IRS and cannot be submitted online. Print and mail to the appropriate address or fax to regional location listed on the form.

VICTIMS OF IDENTITY THEFT

Contact the Office of Student Financial Services for instructions on providing tax data.