

Bluffton University

2023-2024 Verification Worksheet - Dependent

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, you may be asked to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. **You and at least one parent must complete and sign this worksheet**, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Dependent Student's Information

Student's Last Name	First Name	Student's ID #
Student's Street Address		Student's Date of Birth
City	State	Zip Code
Parent's Home Phone Number (include area code) <input type="checkbox"/> check if cell phone		Student's Email Address
		Student's Cell Phone Number

B. Dependent Student's Family Information *If more space is required, attach a separate page.

Full Name	Age			
<ol style="list-style-type: none"> 1. Include yourself. 2. Include your parent(s): <ul style="list-style-type: none"> • <i>If your parents are divorced</i>, list the parent you lived with the most during the last 12 months. If you did not live with one parent more than the other, indicate the parent who provided more than half of your support during the last twelve months. • <i>If your parent is remarried</i>, include your parent and stepparent. • <i>If your parents are unmarried but live together</i>, list Parent #1 and Parent #2. 3. Include your parent(s)' other children, if your parents will provide more than half of their support between July 1, 2023 and June 30, 2024 or if the children would be required to provide parental information if they were completing a 2023-24 FAFSA. 4. Include other dependents, if they now live with your parent(s) and your parent(s) will continue to provide more than half of their support through June 30, 2024. 	<p>Write the age of each household member in the chart below.</p>			
	Relationship (e.g., parent, sibling, etc.)			
	<p>Write the relationship of each household member to the student in the chart below.</p>			
	College			
	<p>Add the name of the college for any household member (excluding parents) who will be enrolled in a degree, diploma, or certificate program at an eligible postsecondary educational institution at least half-time any time between July 1, 2023 and June 30, 2024.</p>			
Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time Y/N
		<i>Self</i>	<i>Bluffton University</i>	

C. Dependent Student’s Income Information to Be Verified – complete either section 1 or section 2

- 1. TAX RETURN FILERS—Important Note:** If the student filed, or will file, an amended 2021 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student filed or will file a 2021 IRS income tax return(s). *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.

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** or a **signed copy of the 2021 income tax return with schedules 1, 2 & 3 if filed.**
- Check here if a **2021 IRS tax return transcript(s)** or **2021 signed tax return(s) with schedules 1, 2 and 3** (if filed) are provided.
- Check here if a **2021 IRS tax return transcript(s)** or **2021 signed tax return(s) with schedules 1, 2 and 3** (if filed) will be provided later.

A **2021 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
- Automated Telephone Request-1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper requestform.

- 2. TAX RETURN NONFILERS**—Complete this section if the student will not file and is not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2021.
- The student was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. **Provide copies of all 2021 IRS W-2 forms issued to the student by employers.** List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student’s name and ID number at the top.

Employer’s Name	2021 Amount Earned	IRS W-2 Attached? Y/N

D. Parent’s Income Information to Be Verified – complete section 1 or section 2

1. TAX RETURN FILERS—Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the parents filed or will file a 2021 IRS income tax return(s). *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 ORT if that information was not changed.

Check the box that applies:

- The parents have used the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student’s FAFSA.
- The parents have 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. (requires FSA ID at [FAFSA.gov](https://fafsa.gov) and submitting a FAFSA correction)
- The parents are unable or choose 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) or signed photocopies of the 2021 income tax return(s) along with schedules 1, 2 and 3 if filed.**
 - Check here if a **2021 IRS tax return transcript(s) or 2021 signed tax return(s) with schedules 1, 2 and 3** are provided.
 - Check here if a **2021 IRS tax return transcript(s) or 2021 signed tax return(s) with schedules 1, 2 and 3** will be provided later.

A **2021 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is usually received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request-1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper requestform.

2. TAX RETURN NONFILERS—Complete this section if the parents will not file and are not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed and neither had income earned from work in 2021 (see note below)
- One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. **Provide copies of all 2021 IRS W-2 forms issued to the parents by employers.** List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student’s name at the top. (see note below)

Employer’s Name	2021 Amount Earned	IRS W-2 Attached? Y/N

**** Parent(s) NOT filing taxes must provide a 2021 [Verification of Non-filing Letter](#) from the IRS. Use Form 4506-T from the IRS.gov website (found under Forms & Instructions) to request this letter.**

E. Certification and Signatures

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

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student's Signature

Date

Parent's Signature

Date

Sign and return this worksheet along with all required documentation to :

**Bluffton University
Financial Aid Office 48
1 University Drive
Bluffton OH 45817-2104**

or Fax: 419-358-3073

or Scan & Email: finaid@Bluffton.edu