

Bluffton University

2023 - 2024 Verification Worksheet

Independent Student

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 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 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. Independent 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
Student's Home Phone Number (include area code)		Student's Alternate or Cell Phone Number
Student's Email Address		

B. Independent Student's Family Information

List below the people in your household.:

- Include yourself.
- Include your spouse if you are married.
- Include 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.
- Include 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 through June 30, 2024.

Report 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. If more space is needed, attach a separate page with the student's name at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>Bluffton University</i>	

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

1. **TAX RETURN FILERS**—**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse 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 student and spouse (if married) 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 by the FAFSA filer.

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. ([FAFSA.gov](https://fafsa.gov), login and make a correction)
- 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) or a signed photocopy of the 2021 income tax return(s) along with schedules 1, 2 and 3 if filed.**

A **2021 IRS Tax Return Transcript** may be obtained through one of these 4 options:

- **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 creditcard 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 request form.

- Check here if a **2021 IRS tax return transcript(s) or signed photocopy of the 2021 income tax return(s)** is provided.
- Check here if a **2021 IRS tax return transcript(s) or signed photocopy of the 2021 income tax return(s)** will be provided later.

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?

*** Nontax filers must provide a 2021 [Verification of Non-filing Letter](#) from the IRS. Use Form 4506-T from the [IRS.gov](https://irs.gov) website (found under Forms & Instructions) to request this letter.

D. Certification and Signatures

I certify that all of the information reported on this worksheet is complete and correct.
The student must sign and date 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

**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 to: 419-358-3073

or Scan & Email: finaid@bluffton.edu