



U.S. Department
of Education

2023-2024 Verification Worksheet

Federal Student Aid Programs

Your application was selected for review in a process called Verification. During this process, St. Joseph's University will be comparing information from your FAFSA application with copies of your and/or your spouse's 2021 Federal tax return transcripts, W-2 forms, and possibly other necessary financial documents. The law specifies we reserve the right to request this information before awarding any Federal or Institutional funds. If there are any discrepancies found between your FAFSA application information and your financial documents, your FAFSA may need to be corrected.

Submit this information to the Office of Financial Aid **immediately**, as we will not typically award Federal and/or institutional awards until this process is complete. Failure to complete verification in a timely manner may lead to cancellation of aid. Should additional information be required, the Office of Financial Aid will contact you quickly. You will always be notified if FAFSA corrections result in changes/cancellation of award(s).

Tax Filers must submit **2021 Federal Tax Transcript(s), a signed copy of the 2021 income tax return and applicable schedules or use IRS Data Retrieval Tool and W-2 forms** for both student and/or spouse, if filed. When submitting tax return transcripts/returns be sure to write student ID# on transcript and indicate whether it is for student or spouse.

- To use the **IRS Data Retrieval Tool** (IRS DRT) via *FAFSA on the Web* to verify your income tax information log on to www.fafsa.gov with FSA ID and password. Contact the financial aid office if more information is needed about using the IRS DRT.
 - **You can obtain a Federal Tax Return Transcript online at www.irs.gov.** If ordering online, click on the "Get a tax transcript" link, then select "Get Transcript ONLINE". Be sure to request the "IRS Tax Return Transcript" and **not** the "IRS Account Transcript". Use the Social Security Number and date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (make sure that the address is typed **exactly as shown** on the 2021 IRS income tax return).
 - **You can obtain a Federal Tax Return Transcript by calling 1-800-908-9946.** Select "Option 2" to request an IRS Tax Return Transcript (not "Tax Account Transcript").
 - **You can obtain a Federal Tax Return Transcript through the mail** by completing IRS Form 4506T-EZ. This form may be downloaded at: <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Non Tax Filers must submit **2021 IRS Verification of Non-filing letter** to the Office of Financial Aid. If you have never filed a tax return in any year, please use the third option, completing IRS form 4506T-EZ. When submitting verification of non-filing letter be sure to write student ID# on letter and indicate if it is for student or spouse.
 - **You can obtain the 2021 IRS Verification of Non-filing letter online at www.irs.gov.** Click "Get Transcript Online" then select "Verification of Non-filing letter".
 - **You can obtain the 2021 IRS Verification of Non-filing letter by calling 1-800-908-9946.**
 - **You can obtain the 2021 IRS Verification of Non-filing letter through the mail** by completing IRS Form 4506T-EZ <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>



2023-2024 Verification Worksheet

Federal Student Aid Programs

Student Information

Last Name	First Name	M.I.	Student ID/ Social Security Number
Address (include Apt. #)			Date of Birth
City	State	Zip Code	Phone Number (Include Area Code)

Family Information

In the space(s) below, list the people in your household including:

- Yourself and/or your spouse (if applicable)
- Your children, if you will provide *more than half of their support* from July 1, 2023 through June 30, 2024 (even if they do not live with you)
- 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 from July 1, 2023 through June 30, 2024.
- Write in the name of the college for any household member who will be attending at least half time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		Self	St. Joseph's University

Please continue to next page

Student (and Spouse) Income Information for Nontax Filers

Check the box that best describes your status for 2021:

- The student and/ or spouse was not employed and had no income earned from work in 2021.
- The student was employed in 2021 and has listed the names of all employers in the box below, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided.

Employer's Name	Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000</i>	<i>Yes</i>

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority. See page 1 for instructions.

Please select one:

- Check here if confirmation of nonfiling is provided.
- Check here if confirmation of nonfiling will be provided later.

Student (and Spouse) Income Information for Tax Filers

Check the box that best describes your status for 2021:

- The student filed a 2021 Federal Tax Return and has used the IRS DRT in the *FAFSA on the Web* to transfer 2021 IRS income tax return information into the students FAFSA. A copy of the student W-2 is attached.
- The student filed a 2021 Federal Tax Return and 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. A copy of the student W-2 is attached.
- The student filed a 2021 Federal Tax Return and 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 signed copy of 2021 Federal Tax Returns**. A copy of the student W-2 is attached.

If second or third box checked, provide IRS Tax Return Transcript(s)/Tax Returns. See page 1 for instructions.

Please select one:

- Check here if a 2021 IRS Tax Return Transcript(s)/returns are provided.
- Check here if a 2021 IRS Tax Return Transcript(s)/returns will be provided later.

Please continue to next page

Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. The student must sign and date.

Student Date

Spouse Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

**Return the completed worksheet to the campus you attend
St. Joseph's University Attn: Office of Financial Aid**

**Long Island and Online Campuses
155 West Roe Boulevard
Patchogue, NY 11772
FAX: 631-650-2525
PHONE: 631-687-2600**

**Brooklyn Campus
245 Clinton Avenue
Brooklyn, NY 11205
FAX: 718-940-5312
PHONE: 718-940-5700**