



## 2023–2024 V5 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, we may ask you 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	Student’s First Name	Student’s M.I.	Last Four Digits of Social Security Number
Student’s Street Address (include apt. no.)			Student’s Date of Birth
City	State	Zip Code	Student’s Email Address
Student’s Home Phone Number (include area code)			Alternate or Cell Phone Number

### B. Independent Student’s Family Information

List below all the people in your household. Include:

- Yourself (on the first line).
- Your spouse, if you are married.
- 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.
- 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.

Include the name of the college for any household member listed 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 your name and last four digits of their Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>Cleary University</i>	<i>Yes/No</i>

**NOTE: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.**

Student Name: \_\_\_\_\_

SSN (Last Four Digits) \_\_\_\_\_

### C. Independent Student's Income Information To Be Verified

**TAX RETURN FILERS** — **Important Note:** The instructions below apply to you and your spouse, if the you are married.

Current Marital Status (Please check one):

Single: \_\_\_\_\_ Married/Remarried: \_\_\_\_\_ (Date: \_\_\_\_\_) Separated: \_\_\_\_\_ (Date: \_\_\_\_\_)

Divorced: \_\_\_\_\_ (Date: \_\_\_\_\_) Widowed: \_\_\_\_\_ (Date: \_\_\_\_\_)

**Instructions:** Complete this section if the student and/or your spouse filed or will file a 2021 IRS income tax return. 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. 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:

- You have used the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- You 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 a signed copy of your 2021 federal income tax return and applicable schedules.**

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

- **Get Transcript by Mail** – Go to [www.irs.gov](http://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](http://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 request form.

If you and your spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s), or a signed copy of the 2021 income tax return and applicable schedules** must be provided for each.

\_\_\_\_\_ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided for you and your spouse.

Student Name: \_\_\_\_\_

SSN (Last Four Digits) \_\_\_\_\_

**TAX RETURN NON-FILERS**— Complete this section if you (and/or spouse if married), **will not file** and are **not required** to file a 2021 income tax return with the IRS.

**Check the box that applies:**

- You (and/or spouse if married) was not employed and had no income earned from work in 2021.
- You (and/or spouse if married) were 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 or an equivalent document is provided. Copies of all 2021 W-2 forms issued to you (and spouse if married) by employers must be provided. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student’s name and ID number at the top.*

Employer’s Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority. An official IRS Letter of Non-Filing can be obtained at [irs.gov](https://www.irs.gov). If unable to obtain a Letter of Non-Filing, a signed statement certifying that the individual(s) attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and were unable to obtain the required documentation will be accepted.

\_\_\_\_\_ **Check here if confirmation of non-filing or signed statement is provided.**

Student Name: \_\_\_\_\_

SSN (Last Four Digits) \_\_\_\_\_

**D. Identity and Statement of Educational Purpose – Must be signed at the Institution or in the presence of a Notary**

To be signed at the Institution:

The student must appear in person at **Cleary University** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. The institution will maintain a copy of the student’s photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student’s ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

To be signed in the presence of a Notary:

If the student is **unable** to appear in person at **Cleary University** to verify his or her identity, the student must provide to the Institution:

- A. A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver’s license, other state-issued ID, or passport; and
- B. The **original** Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing  
(Print Student’s Name)

this Statement of Educational Purpose and that the Federal student financial assistance

I may receive will only be used for educational purposes and to pay the cost of attending

Cleary University for 2023–2024.

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Institutional Official’s Signature

\_\_\_\_\_  
Date

Student Name: \_\_\_\_\_

SSN (Last Four Digits) \_\_\_\_\_

**Notary's Certificate of Acknowledgement Regarding Signed Statement of Educational Purpose on Page 4 of this Document:**

State of \_\_\_\_\_ City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_, personally  
(Date) (Notary's name)

appeared, \_\_\_\_\_, and provided to me on basis of satisfactory  
(Printed name of signer)

evidence of identification \_\_\_\_\_ to be the above-named person who  
(Type of unexpired government-issued photo ID)  
signed the foregoing instrument.

WITNESS my hand and official seal:

\_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_  
(Date)

(Seal)

**E. Certifications and Signature**

The person signing below certifies that all of the information reported is complete and correct.

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

\_\_\_\_\_  
Student's Signature  
(Blue or black ink, no electronic signatures accepted)

\_\_\_\_\_  
Date

***Submit the original worksheet to the financial aid administrator at your school.  
No copies will be accepted.  
You should make a copy of this worksheet for your records.***