

**2023-24 Verification Worksheet
Independent Student**

A. Student Information

<hr/>		<hr/>
Last Name	First Name	Student ID or last 4 digits of SSN
<hr/>		<hr/>
Current Address		Telephone Number
<hr/>		<hr/>
City	State	ZIP Code
<hr/>		<hr/>
		Email Address

B. Family Information

Include:

- Yourself
- Your spouse, if you were married before completing your 2024-25 FAFSA
- Your dependent children, even if they don't live with you, if (a) you provide more than half of their support, or (b) the child would be required to provide parental information when applying for federal student aid
- 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, 2024 through June 30, 2025.

Full Name	Age	Relation to Student
		Yourself

If you need more space, attach a separate page.

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C. 2022 Tax Return Information*

	Student Section (check one box)		Spouse Section (check one box)
<input type="checkbox"/>	I filed a 2022 tax return and linked my taxes to the FAFSA.	<input type="checkbox"/>	I filed a 2022 tax return and linked my taxes to the FAFSA using the IRS Data Retrieval Tool (DRT)
<input type="checkbox"/>	I filed a 2022 tax return and am unable to link my taxes. I attached a signed copy of my 2022 Federal 1040 Form AND all Schedules filed with the tax return.	<input type="checkbox"/>	I filed a 2022 tax return and am unable to link my taxes. I attached a signed copy of my 2022 Federal 1040 Form AND all Schedules filed with the tax return.
<input type="checkbox"/>	I filed a 2022 amended tax return (Form 1040X). I attached a signed copy of my original 2022 Form 1040 AND a signed copy of my Form 1040X.	<input type="checkbox"/>	I filed a 2022 amended tax return (Form 1040X). I attached a signed copy of my original 2022 Form 1040 AND a signed copy of my Form 1040X
<input type="checkbox"/>	I did not file and I was not required to file a 2022 federal income tax return. (Complete Section D)	<input type="checkbox"/>	I did not file and I was not required to file a 2022 federal income tax return. (Complete Section D)

D. 2021 Earned Income Information (Non-filers)

If you and/or your spouse earned income by working in 2022 but did not file a tax return and were not required to file a tax return, list all of your and/or your spouse's 2022 employers and the amount earned at each job (found in Box 1 of the W-2 form):

Name of Employer/Source of income	Student Amount	Spouse Amount	W-2 Attached Y/N Must include if you worked during 2022		
	\$	\$	Yes		No
	\$	\$	Yes		No
	\$	\$	Yes		No
	\$	\$	Yes		No

Check the box if you or your spouse earned no income from work during 2022:

☐ Student: ☐ Spouse

E. Additional Financial Information

1. Did you or your spouse receive child support in 2022? ☐ Yes ☐ No

- Name of person who paid child support _____
- Name of the person to whom child support was paid to: _____
- Name of child(ren) support was paid for: _____
- What was the total amount of child support **received** in 2022?
\$ _____

2. Did you or your spouse pay child support in 2022? ☐ Yes ☐ No

Do not include money paid for children listed in Section B on the first page of this worksheet.

- Name of person who paid child support _____
- Name of the person to whom child support was paid to: _____
- Name of child(ren) support was paid for: _____
- What was the total amount of child support **paid** in 2022?
\$ _____

3. At any time during 2022 or 2023, did you or your spouse receive any of the following federal benefits? (check all that apply)

- ☐ Medicaid ☐ Temporary Assistance for Needy Families (TANF)
- ☐ Supplemental Security Income (SSI) ☐ Free or Reduced Price School Lunch
- ☐ Supplemental Nutrition Assistance Program (SNAP) (formerly known as Food Stamps)
- ☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

4. Did you or your spouse receive untaxed Social Security benefits during 2022? ☐ YES ☐ NO
If you checked YES, what was the total amount received during 2022?

\$ _____

(provide the total amount received in 2022, not the monthly amount)

5. Did you or your spouse earn Federal Work-Study funds in 2022? ☐ Yes ☐ No

You must attach a copy of your and/or your spouse's W-2(s) for these earnings.

F. Sign this Worksheet

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct.

Student: _____ Date: _____

Spouse: _____ Date: _____

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

Please return this form to:

MCAD Financial Aid Office

Upload the form by going to myaid.mcad.edu.

For questions call or email:

(800) 874-6223x Ext #2 or (612) 874-3782

financial_aid@mcad.edu

INSTRUCTIONS FOR VERIFYING 2021 TAX INFORMATION

Choose **ONE** of these options:

- Update FAFSA with IRS Data Retrieval Tool (IRS DRT) **OR**
- Upload a signed copy of IRS Form 1040 and all Schedules filed with the Form 1040 **OR**
- Order a copy of your Tax Return Transcript from the IRS.

To update FAFSA using IRS Data Retrieval Tool (DRT)

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web.

1. Go to www.fafsa.gov
2. Log in and select "[Make FAFSA Corrections](#)"
3. In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2021 IRS income tax information into your FAFSA

The Financial Aid Office will receive a copy of your updated FAFSA within 3-5 business days. You do not need to order the IRS Tax Return Transcript if you are able to update your tax information using the IRS DRT.

*You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the IRS DRT.

To upload a signed copy of your 2021 IRS Form 1040 Include Schedules 1-3 if filed with the 1040.

1. **You must sign on the signature line in the "Sign Here" section on page 2 of the Form 1040, even if you submitted your tax documents electronically. Federal regulations do not allow us to accept unsigned copies.**
2. Go to myaid.mcad.edu – select Documents & Messages tab
3. Select "Upload Now"

To order IRS Tax Return Transcript

To request an IRS tax return transcript:

1. Go to www.irs.gov
2. Select "Get Your Tax Record"
3. Select one option -
 - "Get Transcript Online"
 - Need to create an account
 - To create an account, you will need to be able to verify your identity with one of the items listed below. If you do not have any of these items you will not be able to create an account and receive the transcript online.
 - Credit Card OR
 - Mortgage or Home Equity Loan OR

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- Home Equity Line of Credit OR
- Auto Loan

Upload a copy of **all pages** of the 2021 IRS Tax Return Transcript to myaid.mcad.edu once you receive it.

Special Situations:

Amended Returns - If you filed an amended tax return (Form 1040X), you must submit:

- a 2021 IRS Tax Return Transcript or a **signed** copy of your original 2021 Form 1040 and Schedules **AND**
- a **signed** copy of both pages of your Form 1040-X (Amended U.S. Individual Income Tax Return)

Victims of IRS Identity Theft – A victim of IRS tax-related identity theft must provide a 2021 Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript that includes all of the income and tax information required to be verified **AND** a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax related identity theft. (NOTE: This only applies to victims of IRS tax-related identity theft and does not apply to other types of identity theft.)

Filing Extensions - An individual who has been granted a filing extension by the IRS must provide the following:

- Copy of IRS 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return".
- Copy of the IRS's approval of an extension,
- Copy of the W-2 for each source of employment income received for the 2021 tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the 2021 tax year.