

## 2023-2024 Verification Worksheets Dependent Student-Tracking Group V5

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 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	Student's First Name	MI	Cooper Union Student ID Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip	Student's Email Address
Student's Phone Number		Student's Alternate or Cell Phone Number	

### B. Dependent Student's Family Information

Number of Household Members: List below the people in the parents' household Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other people's support and will continue to provide more than half of their support through June 30, 2024.

Number in College: Please include in the space below information about any household member, excluding the parents, who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024, include the name of the college.

*If more space is needed, provide a separate page with the student's name and ID number at the top*

Full Name	Age	Relationship	College	Will be Enrolled at least Half Time (Yes or No)
		<i>Self</i>	Cooper Union	Yes

**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.

**C. Dependent Student's Income Information to Be Verified**

**1. TAX RETURN FILERS**

**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.ed.gov](https://fafsa.ed.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 once the 2021 IRS income tax return has been filed.
- The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a 2021 IRS Tax Return Transcript(s).

A 2021 IRS Tax Return Transcript may be obtained through:

- **Online Request-** Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click on the "Get A Tax Transcript". Click "Get Transcript by MAIL". Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- **Telephone Request-** 1-800-908-9946
- **Paper Request Form-** Use the links to download IRS Form 4506-EZ or Form 4506-T

Use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2021 IRS Income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return).

In most cases, for electronic filers, 2021 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2-3 weeks after the 2021 IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the 2021 IRS income tax information is available for the IRS DRT or the IRS Tax Return Transcript within 8-11 weeks after the 2021 paper IRS income tax return has been received by the IRS.

- Check here if a 2021 IRS Tax Return Transcript (s) provided.
- Check here if a 2021 IRS Tax Return Transcript (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. Provided copies of all 2021 IRS W-2 forms issued to the student by his/her 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 Student ID at the top*

Employer's Name	2021 Amount Earned	IRS W-2 Attached
ABC Shipping (example)	\$1,280	Yes

**D. Parent's Income Information to be Verified**

**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 the end of the 2021 tax year on 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.ed.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 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 once the 2021 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a 2021 IRS Tax Return Transcript(s).

A 2021 IRS Tax Return Transcript may be obtained through:

- **Online Request-** Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click on the "Get A Tax Transcript". Click "Get Transcript by MAIL". Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- **Telephone Request-** 1-800-908-9946
- **Paper Request Form-** Use the links to download IRS Form 4506-EZ or Form 4506-T

Use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2021 IRS Income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return).

In most cases, for electronic filers, 2021 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2-3 weeks after the 2021 IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the 2021 IRS income tax information is available for the IRS DRT or the IRS Tax Return Transcript within 8-11 weeks after the 2021 paper IRS income tax return has been received by the IRS.

If the parents filed separate 2021 IRS income tax returns, 2021 IRS Tax Return Transcripts must be provided for each.

- Check here if a 2021 IRS Tax Return Transcript(s) is provided.
- Check here if a 2021 IRS Tax Return Transcript(s) will be provided

**2. TAX RETURN NONFILERS**

Complete this section if the student's parent(s) will not file and is not required to file a 2021 income tax return with the IRS. Check the box that applies:

- Neither parent was employed, nor neither had income earned from work in 2021.
- 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 their 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 Student ID at the top

Employer's Name	2021 Amount Earned	For Whom?	IRS W-2 Attached?
<i>Pro Auto</i>	<i>\$980</i>	<i>Father</i>	<i>Yes</i>

**Note:** We may require you to provide documentation from the IRS that indicates a 2021 IRS income tax return was not filed with the IRS.

**E. Identity and Statement of Educational Purpose**

Section E is ONLY to be completed in person at the Institution or in front of a Notary.

The student must appear in person at \_\_\_\_\_  
(Name of Postsecondary Education Institution)

to verify his or her identity by presenting a 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 collect the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Education Purpose provided below. If you cannot appear in person to sign this Statement of Educational Purpose, you will need to provide a copy of your unexpired government issued photo ID and this Statement of Educational Purpose notarized by a notary public. 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 this Statement of Educational Purpose and that the  
Printed Student's Name

Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending  
\_\_\_\_\_ for 2023-2024.  
(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
Student's Signature                      Date                      Student's ID Number

**Notary's Certificate of Knowledge**

State of \_\_\_\_\_ City/County of \_\_\_\_\_ on \_\_\_\_\_ before me, \_\_\_\_\_  
(Notary's Name)

Personally appeared, \_\_\_\_\_ and proved to me on the basis of satisfactory evidence of  
(Printed name of signer)

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

Witness my hand and official seal \_\_\_\_\_  
(Notary Signature)    (Date Commission Expires)

(Seal)

**F. Certification and Signatures**

Each person signing this worksheet certifies that all the information reported on it is complete and correct.

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

**The student and one parent must sign and date.**

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Student's Signature

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Date

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Parent's Signature

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Date

*Do not mail this worksheet to the U.S. Department of Education. You should make a copy of this worksheet for your records.*