Beloit College 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 federal government requires us to confirm the information you (and your spouse, if married) reported on your FAFSA prior to awarding Federal Student Aid. To verify that you provided correct information, the financial aid administrator at Beloit College will compare your FAFSA with the information on this worksheet and with any other documents you are required to submit. You (and your spouse, if married) must complete and sign this worksheet, attach the required documents, and submit the worksheet to the financial aid administrators at Beloit College's Office of Financial Aid. You may be contacted by the Financial Aid Office staff to request additional information or for clarification regarding the information you provided. If you have questions about verification, contact the Office of Financial Aid.

Mailing address: Office of Financial Aid Phone: 608-363-2663
700 College Street Email: faoffice@beloit.edu
Beloit, WI 53511 Securely upload your documents: https://beloit.leapfile.net

A. Student's Information		
Student's Last Name	Student's First Name	 Student ID #

B. Student's Family Information

Household Members: List below the people in your household. Include:

- You, the student.
- Your spouse, if married.
- Your children if you will provide more than half of the children's support from July 1, 2023 through June 30, 2024.
- Other people if they now live with you and you 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.

Please also write in the name of the college/university for any household member who will be attending college at least half time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree or certification program.

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.

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

Full Name	Age	Relationship	Name of College/University (if	Will be Enrolled at Least Half
			any)	Time (Yes or No)
Missy Jones (example)	18	Sister	Central University	Yes
		(Self)		

Student's Last Nar	me Stude	nt's First Name			
Student's Last Nai	Tie Studen	it 3 i ii st ivallie	1411	Student ID #	
	nd Spouse) Income and Tax I				
	oox that applies to you (the student). eed additional assistance, please see	=	-		
I, the stud	dent, (and my spouse, if applicable) file	ed a 2021 IRS income Tax	ر Return and am	providing my tax informati	on by:
OR-	Using the IRS Data Retrieval Tool or	n my FAFSA on the Web t	to transfer 2021 I	RS income tax return infor	rmation
	Have not yet used the IRS Data Ret return	rieval Tool in my FAFSA,	but will use the to	ool to transfer 2021 IRS inc	come tax
-OR-	Providing a signed copy of my (and Schedule 3, and Schedule K-1 or 20				ile 2,
	I, the student and/or spouse, will nemployed and had no income earned from work in www.irs.gov, see page 3 for help)				
-OR-	I, the student and/or spouse, will no in 2020 and have listed below the n whether an IRS W-2 form or an equ your employer and earnings even if	ames of all employers, thivalent document is prov	ne amount earne ided. Please com	d from each employer in 2	021 and
	Employer's Name	IRS W-2 Equivalent Provi	Document Ann	nual Amount Earned in 2021	
	XYZ Shipping (Example)	Ye	?S	\$8,054	
Each person signing or misleading inform	and Spouse) Certification and this worksheet certifies that all of the infomation on this worksheet, you may be find	rmation reported is comple	te and correct. WA	ARNING: If you purposely give	e false
Student's Signature	(Required)		Date		
Spouse's Signature (Required if married)	<u>-</u>	Date		

from

Student's Last Name	Student's First Name MI		Student ID #	
	Instructions Page			

Please fill out page 1 and 2 to the best of your ability. This page does <u>not</u> need to be submitted to the Office of Financial Aid with page 1 and 2. If you have any questions, please feel free to contact the Office of Financial Aid at faoffice@beloit.edu or call 608-363-2663.

How to use the IRS Data Retrieval Tool (DRT) to import tax data into the FAFSA

- 1. Go to www.studentaid.gov, click the white "Login" button and log in using the student's FSA ID and password.
- 2. Click "Edit FAFSA form" on the homepage and create a Save Key.
- 3. Click on the "Parent Financials" tab.
- 4. For the question "Have your parents completed their IRS income tax return" choose "Already Completed."
- 5. In the IRS Data Retrieval Tool box click proceed to the IRS.
- 6. Select answer to "which parent are you," enter parent's FSA ID and click "Link to IRS."
- 7. Click "OK" to "Leaving FAFSA on the Web."
- 8. Click "OK" to the pop-up message "This Gov't System is for Authorized Use Only."
- 9. Enter information request (Filing Status, Address, etc.) and click "Submit." If the transfer is successful, you may proceed to step 10. If any of the answers you reported does not match the IRS records, the search for the tax data will not be successful. Please be sure to include correct zip codes, apartment numbers, PO boxes, etc. The address must match the address reported on the most recent tax return and the parent SSNs must be correct.
- 10. Click "Transfer my tax information into the FAFSA" on the left of the page and click "Transfer Now" on the right.
- 11. Repeat this process for student if the student has filed taxes- If not, click "Next" at the bottom of the Financial Information Page.
- 12. You will be directed back to the FAFSA webpage. At the "List of Changes," review, then scroll to the bottom and click "Next."
- 13. Click "Sign and Submit" and follow instructions to submit the changes.
- 14. You will receive a confirmation number and a confirmation email.

Please note: Independent students will not need to submit parent information but will follow the same steps for entering their own tax information.

How to request an IRS Tax Return Transcript

There are four different ways to request a tax return transcript:

- 1) ONLINE: Go to IRS.gov, click on "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax 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. If you are unable to create an account online, see #2.
- 2) MAIL: Go to IRS.gov, click "Get Your Tax Record" and then click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 3) **BY PHONE**: To order by phone, call 800-908-9946 and follow the prompts.
- 4) **PAPER**: Complete Form 4506-T (can be obtained from IRS.gov).

How to request a Verification of Non-Filing Letter

The Verification of Non-Filing Letter provides proof that the IRS has no record of a filed Form 1040, 1040A, or 1040EZ for the year you requested. It doesn't indicate whether you were required to file a return for that year.

There are two ways to request a Verification of Non-Filing Letter:

- 1) **ONLINE**: (For individuals who have filed taxes in prior years only. If you have never filed a tax return before, please see #2) Go to IRS.gov and click on Get Your Tax Record. Click "Get Transcript ONLINE." If at any point you cannot validate your identity, please see #2.
- 2) Paper Request: Download the IRS Form 4506-T at IRS.gov. Complete the form and submit to the IRS using the address or fax number provided on page 2 of the form. You can expect to receive the Verification of Non-Filing via mail within 10 days.

Student's Last Name	 Student's First Name		Student ID #	_
Student's Last Name	Student's First Name	IVII	Student ID#	

Having issues with requesting these items from the IRS?

The IRS.gov help desk can be reached at 800-829-1040.