

## 2024–2025 Verification Worksheet Dependent Student

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Student's Name

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Student ID

### 1. Student's Family Information

List the people in your family in the chart below.

**Include:**

- Yourself (the student)
- Your parent(s) (including a stepparent, if applicable) even if you don't live with your parent(s).
  - o Exclude a parent who is not living in the household because of separation or divorce.
  - o Exclude a deceased parent.
  - o Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- Your siblings if the following are true:
  - o They live with the student's parent(s) (or live apart because of college enrollment),
  - o They receive more than half of their support from the student's parent(s), and
  - o They will continue to receive more than half of their support from the student's parent(s) during the 2024-2025 academic year.
  - o Exclude any unborn children.
  - o This should align with whom your parent(s) could claim as a dependent on their tax return if the parent(s) were to file a tax return at the time of completing the 2024-2025 FAFSA.
- Other persons if the following are true:
  - o They live with the student's parent(s),
  - o They receive more than half of their support from the student's parent(s), and
  - o They will continue to receive more than half of their support from the student's parent(s) during the 2024-2025 academic year.

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

Full Name	Age	Relationship to You
<i>Marty Jones (example)</i>	<i>18</i>	<i>Self</i>

### 2. Student's Tax Information (Check all boxes that apply)

I, the student, **DID** (or will) file a 2022 tax return

- If you were unable to use the IRS Direct Data Exchange on the FAFSA, you will need to provide the institution with a copy of your **2022 IRS Tax Return Transcript or a signed copy of the 2022 income tax return and applicable schedules.**

I, the student, **DID NOT** file a 2022 tax return **because:**

- I did not work and had no income earned from work in 2022.
- I did work in 2022, but I am not required to file a 2022 tax return.

- **Complete the information below AND attach a W-2 form for each job you had in 2022.**

Employer's Name	2022 Amount Earned	W-2 Attached? Yes / No

### 3. Parent's Tax Information (Check all boxes that apply)

**Note: The parent(s) with whom you live or most recently lived, as well as step-parent, if remarried.**

My parent(s) **DID** (or will) file a 2022 tax return

- If your parent(s) were unable to use the IRS Direct Data Exchange on the FAFSA, they will need to provide a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**
- If your parent(s) have been granted a filing extension by the IRS beyond the automatic six-month extension for the tax year 2022, you must provide
  - A copy of the IRS's approval of an extension beyond the automatic six-month extension for 2022;
  - A signed statement listing the sources of any 2022 income and the amount of income from each source;
  - A copy of the W-2 for each source of employment income received or an equivalent document; 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 tax year 2022.
- If your parent(s) filed or will file an amended 2022 IRS tax return, you must provide
  - A signed copy of the 2022 IRS Form 1040X that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:
    - Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
    - A 2022 IRS Tax Return Transcript or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
    - A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

**If your parent/stepparents are married but filed separately, both must submit 2022 tax return information.**

- A **2022 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 is displayed online upon successful completion of the IRS's two-step authentication.

- Automated Telephone Request: 1-800-908-9946. A 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.

My parent(s) **DID NOT** file a 2022 tax return *because*:

- My parent(s) did not work and had no income earned from work in 2022.
- My parent(s) worked in 2022, but will not be required to file a 2022 tax return.

- **Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2022 tax return.**
- **Complete the information below AND attach a W-2 form for each job in 2022.**

Employer's Name	Whose income? Father / Stepfather Mother / Stepmother	Annual Amount Earned in 2022	W-2 Attached? Yes / No

**THE SCHOOL CANNOT COMPLETE THE VERIFICATION PROCESS UNTIL THE TAX RETURN INFORMATION HAS BEEN SUBMITTED.**

Certification and signatures: Each person signing this worksheet certifies that all of the information on it is complete and correct. The student and one parent must sign and date. If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

**When you have completed this form, please return it, along with all requested documents, to the financial aid office. You can either mail, (1510 Lake Rd., Dyersburg, TN 38024) fax (731-286-3354) or drop off at any of our 3 locations.**

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