DOMINICAN UNIVERSITY of CALIFORNIA

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2023-24 Independent Standard Verification Worksheet

_____   _____

Student Last Name   First Name   Middle Initial   Dominican Student ID Number

_____   _____

Street Address   City   State   Zip   Phone Number

Your 2023-24 Free Application for Federal Student Aid (FAFSA) was selected for verification, a process in which the Office of Financial Aid must obtain documentation from you to ensure the accuracy of the information submitted on your FAFSA. The information provided on your FAFSA will be compared with the information on the required documents you submit. If there are differences between the FAFSA and the documents, your FAFSA information may be updated.

Section A: Number of Household Members and Number in College

In the chart below, please list **ALL** of the people in your household. Make sure to include:
- Yourself, the student.
- Your spouse if you are married.
- Your children or your spouse's children **IF** you or your spouse will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide your or your spouse's information if they were completing a FAFSA for 2023-24. 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 or your spouse provide more than half of the other people's support <u>and</u> will continue to do so through June 30, 2024.

For each person list: *full name*, *age,* and *relationship to the student*. If any household member listed is enrolled or will be enrolled <u>at least half-time</u> in a college degree, diploma, or certificate program that is Title IV eligible any time between July 1, 2023, through June 30, 2024, please indicate the *name of the college* and *indicate whether or not the person will be enrolled at least half-time*. **Please list all household members that meet the above criteria regardless of whether the individual currently attends college.** If more space is needed, please provide a separate page that includes the student's name and Dominican ID number at the top.

Full Name	Age	Relationship to Student	College Name (if applicable)	Enrolled at least half-time? (Yes/No)
		Self	*Dominican University of California*	

Section B: Student's 2021 Tax & Income Information – *To be completed by the student*

If you have an **Unusual Tax Filing Circumstance**, please indicate the circumstance, and see Pages 3 & 4 for additional instructions.

Check the options that apply:

❑ I, the student, and/or my spouse (if applicable) have filed a 2020 Federal Income Tax Return, **AND**
  o I/we have used or will use the **IRS Data Retrieval Tool** in FAFSA to transfer my/our 2020 IRS income tax information into my FAFSA, **OR**
  o I/we have provided or will provide a copy of my/our **2020 Tax Return Transcript** from the IRS (See Page 3) or a signed copy of my/our **2021 federal income tax return and applicable schedules**

OR

❑ I, the student, and/or my spouse (if applicable) have not filed, and I/we are not required to file a 2021 Federal income tax return, **and** I/we have provided or will provide a **Verification of Non-Filing Letter** from the IRS (see Page 3) **AND**
  o I/we have no income earned from work in 2021, **OR**
  o I/we earned income from work in 2021. I have listed below the names of all employers, the amount earned from each employer in 2021, and I have provided or will provide **copies of ALL 2021 W-2(s) or a 2021 Wage & Income Transcript** from the IRS for each source of income listed.

Employer's Name	Amount Earned	W-2 provided?
		❑ Yes ❑ No
		❑ Yes ❑ No
		❑ Yes ❑ No
		❑ Yes ❑ No

CERTIFICATION – *To be completed by the student. The following signatures certify that all of the information reported on this worksheet 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.**

_____   _____
Student Signature (required)   Date

_____   _____
Spouse Signature (optional)   Date

Instructions for Providing Tax Information

Instructions for using the IRS Data Retrieval Tool (DRT) in FAFSA
1. Login to the student's FAFSA with the student's FSA ID.
2. In the Student Financial Information Section, complete the questions about whether taxes have been filed, the filing status, and whether a Puerto Rican/foreign tax return were filed for 2021.
3. If you are eligible to use the DRT, a "LINK TO IRS" button should appear. Click it.
4. On the next page, click on the "PROCEED TO IRS SITE" button.
5. Your name and information should appear on the IRS site. Enter your information and address **exactly** as it appears on your 2021 Federal Income Tax Return. Click submit.
6. You will be taken to a page that confirms which items will be transferred from the IRS to the FAFSA. Under the "Transfer My Tax Information into FAFSA" heading, check the box to confirm the transfer of the data and click on the "Transfer Now" button. You will be taken back to the FAFSA.
7. Complete, sign, and submit the remaining portions of the FAFSA.

Note: Individuals filing as Married Filing Separately are not eligible to use the IRS DRT and must provide the Tax Return Transcripts (see instructions below) or signed copies of the 2021 income tax return and all applicable schedules for each individual.

Instructions for requesting the Tax Return Transcript or Verification of Non-Filing
1. Go to www.irs.gov/individuals/get-transcript
2. Select either "Get Transcript Online" to download most transcripts (requires IRS account) or "Get Transcript by Mail" to request a transcript to be mailed (Tax Return Transcript only)
3. Follow instructions for each method
4. Download or request the needed items
   a. The Tax Return Transcript will be listed as the Return Transcript for tax filers.
   b. Verification of Non-Filing Letter will also be listed as Return Transcript for non-tax filers.
   c. Note: The Verification of Non-Filing Form may also be requested by filing Form 4506-T from the IRS.

Unusual Tax Filing Circumstances
In some cases, you may not be able to submit a Tax Return Transcript or use the IRS DRT in FAFSA to provide your tax information. Please refer to the situations below for additional information.

Individuals Granted a Filing Extension by the IRS
An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2021, must provide the following items:
- Copy of IRS Form 4868 that was filed with the IRS for tax year 2021
- Copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2021
- Verification of Non-Filing (VNF) Letter (see instructions on Page 3) dated on or after October 1, 2021 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation.
- W-2(s) for each source of employment income received or an equivalent document for tax year 2021
- 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 tax year 2021 (preferably from an accountant)

Individuals who filed an Amended Return

An individual who amended a U.S. Income Tax Return for tax year 2021 needs to provide the following documents:
- **Signed and dated** copy of the 2021 IRS Form 1040X that was filed with the IRS, **AND**
  - Tax information submitted in the FAFSA using the **IRS Data Retrieval Tool, OR**
  - A **2021 IRS Tax Return Transcript**, **OR**
  - A signed copy of the **2021 IRS Form 1040 and the applicable schedules** that were filed with the IRS

Individuals who are Victims of Tax Administration Identity Theft

An individual who was the victim of IRS tax-related identify theft must provide the following items:
- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2021 IRS Form 1040 and applicable schedules.
- A statement signed and dated by the tax filer indicating that he/she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identify theft.

Individuals who filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of their income tax return that was filed with the relevant tax authority. However, if the Office of Financial Aid questions the accuracy of the information on the signed coy of the income tax return, the tax filer must provide a copy of the tax account information issued by the relevant tax authority before verification can be completed.