

2023-2024 V5 Aggregate Verification Worksheet - Dependent

Student Name: _____

Student ID: _____



Office of Financial Aid

Dependent students are students who are required to include parent information on their FAFSA.

You can easily determine this by using this link: <https://studentaid.ed.gov/sa/sites/default/files/dependency-status.png>.

READ BEFORE COMPLETING THIS FORM

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for a review process called verification. The law states that before awarding Federal Student Aid, we must confirm the information reported on your FAFSA. To verify that accurate information was provided, the financial aid office will compare your FAFSA with information collected on this worksheet and other required documents. If there are differences, your FAFSA information may need to be updated and your financial aid would be adjusted accordingly.

Please monitor your PFW student email for any communication regarding this process. If further information is needed, and/or after the verification is complete, you will be notified through your PFW student email.

You must complete and sign this worksheet in BLUE or BLACK INK and attach all required documents. Financial aid awards cannot be disbursed until the verification process is complete. Incomplete submissions will NOT be processed which may result in the reduction or cancellation of financial aid awards causing a balance with PFW which you would be responsible to pay.

1. Household Information:

List below the people in your parent's household including:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s). (To determine which parent's household to list when parents are divorced/separated go to <https://studentaid.gov/sites/default/files/who-is-my-parent.png>.)
- Your parent(s)' other children if your parent(s) 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 parental information when completing a 2023-2024 FAFSA. Include children who meet either of these standards even if they do not live with your parents.
- DO NOT INCLUDE children for whom your parents reported child support paid on your FAFSA.
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.
- Include the name of the college for any household member listed, excluding parent(s), who will be enrolled in at least six credit hours in a degree, diploma, or certificate program at a Title IV eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024.

Full Name	Age	Relationship to Student	College (if enrolled at least 6 credit hours)
		Self	Purdue University Fort Wayne

Check the following benefits that anyone in your household (named above) received at any time in 2021 or 2022:

☐ SNAP ☐ WIC ☐ TANF ☐ Disability ☐ Medicaid or SSI ☐ Free or Reduced Lunch

Verifications can be submitted by mail, or in person. Email submissions and electronic signatures will not be processed.

Student Name: _____

Student ID: _____

2. Student Income Information:

Check ONE box only.

TAX RETURN NON-FILERSComplete this section if you will not file and were not required to file a 2021 income tax return with the IRS.

- ☐ You were not employed and **had no income** from work in 2021.
- ☐ You **were employed** in 2021 but did not file and were not required to file an income tax return. The names of all your employers, the amount earned from each employer in 2021, and whether an IRS form is attached are listed below. **You must also attach a copy of all 2021 IRS W2 forms issued to you by employers OR a Wage and Income Transcript.**

You can order this from the IRS by going to <https://www.irs.gov/individuals/get-transcript> and clicking on "Get Transcript Online" or by mailing IRS Form 4506-T to the IRS. If you cannot provide one of these, you must give a valid reason why a W2 is not available. List every employer even if they did not issue an IRS W2 form. If more space is needed, attach a separate page with your name and student ID at the top.

Employer Name (only complete this information if you did <u>not</u> file a 2021 federal tax return.)	Annual Amount Earned in 2021	IRS W2 Attached? (Yes/No)
Total Amount of Income Earned from work in 2021	\$	

TAX RETURN FILERSComplete this section if you filed or will file a 2021 income tax return with the IRS.

- ☐ You **have already used** the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2021 IRS income tax return information into your FAFSA.
- ☐ You are **unable or chose not to** use the IRS Data Retrieval Tool in FAFSA on the Web.
Attach a Tax Return Transcript.
- To obtain an IRS Tax Return Transcript either (1) go to <https://www.irs.gov/individuals/get-transcript> and click on "Get Transcript by Mail" or "Get Transcript Online", or (2) call 1-800-908-9946. You will need your Social Security Number, date of birth and most recent address on file with the IRS. Request the "IRS Tax Return Transcript" and not the Tax Account Transcript.
- ☐ You filed 2021 taxes and **later amended** the taxes.
Attach a Tax Return Transcript AND a signed and dated copy of your 1040X.

Verifications can be submitted by mail, or in person. Email submissions and electronic signatures will not be processed.

Student Name: _____

Student ID: _____

3. Parent/Stepparent Income Information:

Note – If two parents were reported in the household on the FAFSA, the instructions below refer and apply to both parents.

TAX RETURN NON-FILERS*Complete this section if your parent(s)/stepparent will not file & were not required to file a 2021 income tax return with the IRS.

**Note: Your parent(s)/stepparent are required to attach a Verification of Non-Filing letter dated on or after October 1, 2022. This is obtained by going to <https://www.irs.gov/individuals/get-transcript> and clicking on “Get Transcript Online” or by mailing the IRS Form 4506-T to the IRS.*

- ☐ Your parent(s)/stepparent was not employed and had no income from work in 2021.
- ☐ Your parent(s)/stepparent was employed in 2021 but did not file and was not required to file an income tax return. The names of all employers, the amount earned from each employer in 2021, and whether an IRS form is attached are listed below. ***They must also attach a copy of all 2021 IRS W2 forms issued to them by employers OR a Wage and Income Transcript ordered from the IRS.***

They can order this from the IRS by going to <https://www.irs.gov/individuals/get-transcript> and clicking on “Get Transcript Online” or by mailing IRS Form 4506-T to the IRS. If they cannot provide one of these, they must give a valid reason why a W2 is not available. List every employer even if they did not issue an IRS W2 form. If more space is needed, attach a separate page with your name and student ID at the top.

Employer Name (only complete this information if you did <u>not</u> file a 2021 federal tax return.)	Annual Amount Earned in 2021	IRS W2 Attached? (Yes/No)
<i>Total Amount of Income Earned from work in 2021</i>	\$	

TAX RETURN FILERSComplete this section if your parent(s)/stepparent filed or will file a 2021 income tax return with the IRS.

- ☐ Your parent(s)/stepparent has already used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer their 2021 IRS income tax return information into your FAFSA.
- ☐ Your parent(s)/stepparent are unable or chose not to use the IRS Data Retrieval Tool in FAFSA on the Web. Attach a Tax Return Transcript. If your parents are married/remarried and did not file jointly, a Tax Return Transcript is required for both parents (and/or stepparent).
- To obtain an IRS Tax Return Transcript either (1) go to <https://www.irs.gov/individuals/get-transcript> and click on “Get Transcript by Mail” or “Get Transcript Online”, or (2) call 1-800-908-9946. You will need your Social Security Number, date of birth and most recent address on file with the IRS. Request the “IRS Tax Return Transcript” and not the Tax Account Transcript.*
- ☐ Your parent(s)/stepparent filed 2021 taxes and later amended their taxes.
For each 2021 tax return filed, attach a Tax Return Transcript AND a signed and dated copy of each 1040X for each amended return filed.

Verifications can be submitted by mail, or in person. Email submissions and electronic signatures will not be processed.

Student Name: _____

Student ID: _____

4. Photo Identification:

You must either present your non-expired, government issued photo ID to a PFW financial aid staff member OR to a notary and attach a copy of your ID that is signed and dated by the notary.

I have attached (check one):

- ☐ Driver's license or other state-issued photo identification (ID)
- ☐ Passport
- ☐ Other _____

5. Statement of Educational Purpose:

Complete option one OR two.

☐ **OPTION ONE**

Complete this section if you submit your ID to the PFW financial aid office in person.

I certify that I, _____ (printed student's name), am the individual signing this *Statement of Educational Purpose* and that the Federal student financial assistance I may receive will only be used for educational purposes including paying the cost of attending Purdue University Fort Wayne for the 2023-2024 academic year.

Student Signature: _____

Date: _____

School Official Signature: _____

Date: _____

Student Name: _____

Student ID: _____

☐ **OPTION TWO**

Complete this section if you submit your ID to a notary* instead of the PFW financial aid office.

*The notary must copy your original documents, sign and date the copies, and witness your signature below:

I certify that I, _____ (printed student's name), am the individual signing this *Statement of Educational Purpose* and that the Federal student financial assistance I may receive will only be used for educational purposes including paying the cost of attending Purdue University Fort Wayne for the 2023-2024 academic year.

Student Signature: _____

Date: _____

On _____ (date), before me, _____ (Notary's name),
personally appeared _____ (student's name), and proved to me
because of satisfactory evidence of identification (_____ - type of photo ID*)
to be the above-named person who signed the foregoing instrument.

***Notary, please copy student's ID, sign and date, and attach to this form.**

Notary Seal

Notary Signature: _____

My Commission Expires on: _____

Verifications can be submitted by mail, or in person. Email submissions and electronic signatures will not be processed.

Student Name: _____

Student ID: _____

6. Certifications and Signatures:

By signing below, I certify that the information provided is truthful and accurate and I am asking the Purdue University Fort Wayne Financial Aid Office to make the above indicated adjustments to my FAFSA. I further understand that making these adjustments may cause changes to my student account and my bill, and that it is my responsibility to ensure my bill is paid in full with the Bursar after these adjustments are processed to my financial aid account. I agree to notify the PFW Financial Aid Office if any of the information provided on this form changes. I understand that if I purposely provide false or misleading information, I may be fined, sent to prison, or both.

Student Signature: _____

Date: _____

Parent Signature: _____

Date: _____

(Either parent whose information is on the FAFSA can sign this form.)

What Happens Next:

Verifications are handled in the order they are received. Once your form is received you will see it listed on your goPFW account under the Billing and Financial Aid tab. Please monitor your PFW student email for any communication regarding your verification. If further information is needed to process your verification, and/or after your verification has been processed, you will be notified through your PFW student email.

If your verification is completed after the semester has ended, aid will be adjusted according to the credits completed that semester. Once your verification is submitted, please allow 3-5 business days for processing before aid will disburse to your account. Any refunds will take an additional 2-3 business days; please allow additional processing time during peak seasons.

Office Use Only:

Received by and Date: _____

Signed by Student and Parent: _____

Completed by and Date: _____

All Required Documents Attached: _____

Submitted to CPS by and Date: _____

New ISIR Received Date: _____

Transaction, Sequence, and EFC: _____

Verifications can be submitted by mail, or in person. Email submissions and electronic signatures will not be processed.