2023-2024 Dependent Verification Worksheet

Complete no later than August 15, 2023

Student Name: _____

Last 3 Digits of Student ID: _____

Two Ways to Submit Parent and Student Tax Information:

1. **IRS Data Retrieval Tool:** Log into fafsa.gov and click "Make FAFSA Corrections". In the Financial Information Sections click "Link to IRS" to first link parent taxes, then link student taxes. Fill out the form then click "Transfer my tax information into the FAFSA". Last, resubmit the FAFSA. The Financial Aid Office will be notified in 1-3 days.

2. **Signed Copies of 2021 Tax Returns:** Fax or mail SIGNED copies of both student and parent 2021 tax returns. Please do not send any personally identifiable information (PII) via email if you are not able to encrypt it. PII includes attachments with Social Security Numbers, ID Numbers, dates of birth, etc. You may mail your information to us at Office of Student Financial Aid, University of Mount Union, 1972 Clark Ave, Alliance, OH 44601 or deliver to our office on the lower level in the Gartner Welcome Center.

Step 1: Parent Tax Information

Check one of the following:

___ I was not required to file a 2021 Federal Tax Return and had some or no income. I attached the IRS Confirmation of Non-Filing and all 2021 W-2s/1099 forms.

> **How to get the IRS Confirmation of Non-Filing**: Go to https://www.irs.gov/forms-instructions and choose Form 4506-T. Complete the form and check box 7. You will then need to mail or fax the form to the IRS. When you receive the Confirmation of Non-Filing Letter in the mail, send a copy to the Office of Student Financial Aid. If you are unable to obtain the IRS Confirmation of Non-Filing Letter, please contact our office.

___ I filed a 2021 tax return and used the IRS Data Retrieval Tool.

___ I filed a 2021 tax return but am unable to use the IRS Data Retrieval Tool and have attached a SIGNED copy of my 2021 Tax Return.

Step 2: Student Tax Information

Check one of the following:

___ I was not required to file a 2021 Federal Tax Return and had no income.

___ I was not required to file a 2021 Federal Tax Return but had some earnings. I attached all 2021 W-2s/1099 forms

file I filed a 2021 tax return and used the IRS Data Retrieval Tool.

___ I filed a 2021 tax return but am unable to use the IRS Data Retrieval Tool and have attached a SIGNED copy of my 2021 Tax Return.

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Step 3: Household Information 2023-2024

Follow the steps below to determine household size:

1. List yourself (the student):

Student's Name	Student's Age

2. List the parent(s) that you live with 51% of the time when not at school (including a step-parent):

Parent's Name	Parent's Age	Relationship to Student

3. List your parent(s)' other children or other people your parent(s) will provide 51% of their financial support between 7/1/23 and 6/30/24:

Full Name	Age	Relationship to Student	College Attending	Will be enrolled in at least 6 credit hours?
				Yes No
				Yes No
				Yes No
				Yes No

Step 4: Certification

___ I herby declare that all the information reported on this document is true, complete, and accurate to the best of my knowledge.

___ I understand that any false statement or misrepresentation will be cause for denial, reduction, cancellation, and/or repayment of financial aid.

___ I understand that the tax information and information provided on this worksheet could change my financial aid and that it is my responsibility to review the updated award letter I receive after verification is complete.

Student Name: _____   Date: _____

Student Signature: _____

Parent Name: _____   Date: _____

Parent Signature: _____

Step 5: Email, Mail, Fax, or Drop-off Documents to the Office of Student Financial Aid

Email documents to finaid@mountunion.edu or **Mail** to the Office of Student Financial Aid, 1972 Clark Ave, Alliance, OH 44601
Fax documents M-F 8-4 to (330) 829-2814

Please do not send any personally identifiable information via email (e.g. Social Security Numbers, dates of birth, etc.)

Questions? Contact the Office of Student Financial Aid
(330)823-2674 finaid@mountunion.edu