

Verification Worksheet
Federal Student Aid Programs

Your application is selected for a review called "Verification." In this process, WVC will be comparing information from your application with your (and your spouse's, if applicable) **2021** Federal tax information, W-2 forms, or other financial documents. Federal regulations give our office the right to request this information before awarding financial aid. If there are differences between your application information and your financial documents, WVC will make corrections electronically to have your information reprocessed. To avoid delays in processing your financial aid, please return verification items as soon as possible.

Wenatchee Valley College must review the requested information, under the financial aid program rules (CFR Title 34, Part 668).

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

A. STUDENT INFORMATION

<hr/> Last Name	<hr/> First Name	<hr/> MI	<hr/> SSN: _____
<hr/> Address (include apt # if applicable)	<hr/> Date of Birth		<hr/> SID: _____
<hr/> City	<hr/> State	<hr/> ZIP Code	<hr/> Daytime Phone (include area code)

Use this checklist to ensure you complete all steps – INCOMPLETE FORMS WILL NOT BE PROCESSED:

Complete this worksheet. **ALL SECTIONS MUST BE COMPLETED.** Enter a zero for amount if a field does not pertain to you. Read instructions carefully and follow all directions. *If you have questions, contact our office for assistance.*

SIGN THE WORKSHEET

Attach all required documentation. Forms missing required documentation will be considered incomplete.

Submit worksheet, plus any required documentation, to the financial aid office at Wenatchee Valley College.

➔ *Please note that we may request other documents to verify additional information as we deem necessary.* ←

B. FAMILY INFORMATION

List current household members as directed below. If any household member will be attending college at least half time, enrolled in a degree or certificate program, include the name of the college. If you need more space, attach a separate page.

****If you have any questions about who to include in your household, contact the financial aid office.****

Include:

- Yourself (list yourself first)
- Your spouse (if married, and not separated)
- Your children (under age 24), **if you will provide more than half of their support from July 1, 2023, through June 30, 2024.**

Include other people as part of your household ONLY IF:

- They are currently living with you, **and you provide more than half of their support and you will continue to provide more than half of their support from July 1, 2023, through June 30, 2024.**

Documentation of support may be required

Full Name	Age	Relationship	College
<i>(example) Martha Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		STUDENT	Wenatchee Valley College

For	<input type="checkbox"/> V1 <input type="checkbox"/> V4 <input type="checkbox"/> V5 <input type="checkbox"/> 0B <input type="checkbox"/> 5# <input type="checkbox"/> 5\$
Office	TR/EFC ____/____ <input type="checkbox"/> OK or
Use	<input type="checkbox"/> Corrected to ____/____
Only:	Initials: ____ Date: ____

Verification Worksheet
Federal Student Aid Programs

C. INCOME INFORMATION page 2 of 4

- ➔ Read carefully and follow the instructions in each section. If you have questions or problems, contact us for help.
- ➔ **Tax-filers:** You will need to use one of the following three options to verify income:
 - A. IRS Data Retrieval Tool (DRT) within FAFSA:** Go to studentaid.gov, log in, select "Make FAFSA Corrections," and navigate to the Financial Information section. Make sure you save, sign, and submit the FAFSA when complete.
 - B. Official Tax Return Transcript:** You can request a **FREE** 2021 tax return transcript online at www.irs.gov (note: when you receive it, keep original, submit a copy to us).
 - C. SIGNED Copy of Filed Tax Return:** Include copies of ALL schedules submitted with filed return.
- ➔ **NON-tax-filers:** Attach copies of all W2s. Also attach an official IRS "Verification of Non-filing Letter". You can download the IRS Form 4506-T from <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Use checkbox 7 to request the non-filing letter. If you are missing W2's and cannot get from your employer, you can also use **4506-T** to request a "Form W2 Transcript".

1. MARITAL STATUS:

As of today, I am: (check the correct boxes below and follow the instructions)

<input type="checkbox"/>	Married and living with my spouse (Instructions: Complete Items #2 and #3 below)
<input type="checkbox"/>	Single, divorced, widowed, or separated from spouse AND
<input type="checkbox"/>	I did NOT file a joint tax return for 2021 (Instructions: Complete #2, Skip #3 below.)
<input type="checkbox"/>	I filed a Joint tax return for 2021 (Instructions: Contact our office for assistance in completing this form.)

2. STUDENT EARNED INCOME & TAX INFORMATION:

Check only ONE box and follow directions – if you have questions, contact the financial aid office

<input type="checkbox"/>	I am attaching a SIGNED copy of my 2021 IRS tax return or official IRS <u>transcript</u> .						
<input type="checkbox"/>	I used the IRS Data Retrieval Tool (<i>see instructions at top of page</i>) to transfer my 2021 tax information to my FAFSA & MADE NO CHANGES TO THE DATA RETRIEVED . Date this was done: _____						
<input type="checkbox"/>	I filed an AMENDED tax return after my initial 2021 tax return. Attach BOTH a signed copy of IRS tax form 1040X AND either a Tax Return Transcript or a SIGNED copy of IRS tax return showing initial return information.						
<input type="checkbox"/>	NON-FILER: I (Student) will not file - and am not required to file - a 2021 tax return. *MUST ATTACH OFFICIAL IRS "VERIFICATION OF NON-FILING LETTER" and complete the remainder of this section. *						
CHECK ONE BOX: I (student) was employed & had earned income from work in 2021 <input type="checkbox"/> Yes* <input type="checkbox"/> No *If "YES", list all employer(s) & income received in 2021 and attach copies of all W-2s. (attach add'l sheet if needed)							
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">List all Employer[s]</th> <th style="width: 20%;">Total Income Earned</th> </tr> </thead> <tbody> <tr> <td> </td> <td style="text-align: center;">\$</td> </tr> <tr> <td> </td> <td style="text-align: center;">\$</td> </tr> </tbody> </table>	List all Employer[s]	Total Income Earned		\$		\$
List all Employer[s]	Total Income Earned						
	\$						
	\$						

3. SPOUSE EARNED INCOME & TAX INFORMATION: (Complete this section only if currently married & living with spouse)

Check ONE box and follow any instructions – if you have questions, contact the financial aid office

<input type="checkbox"/>	My spouse and I filed a joint 2021 federal income tax return.						
<input type="checkbox"/>	My spouse filed a separate 2021 tax return. Attach SIGNED copy of Spouse's 2021 return or official IRS transcript.						
<input type="checkbox"/>	My spouse filed separately & later AMENDED the 2021 tax return. Attach BOTH a signed copy of IRS tax form 1040X AND either a Tax Return Transcript or a SIGNED copy of IRS tax return showing initial return information						
<input type="checkbox"/>	NON-FILER: My spouse will not file - and is not required to file - a 2021 tax return. *MUST ATTACH OFFICIAL IRS "VERIFICATION OF NON-FILING LETTER" and complete the remainder of this section. *						
CHECK ONE BOX: Spouse was employed & had earned income from work in 2021 <input type="checkbox"/> Yes* <input type="checkbox"/> No *If "YES", list all employer(s) & income received in 2021 and attach copies of all W-2s. (attach add'l sheet if needed)							
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	\$						
	\$						

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D. UNTAXED INCOME & UNTAXED BENEFITS/ASSISTANCE page 3 of 4

➔ Answer #1 and #2, following the instructions for each. If you have questions, please contact our office for assistance.

1. STUDENT UNTAXED BENEFITS/ASSISTANCE:

Instructions: If you and/or any of the household members listed on page 1 received any of these items during any of the time periods, check the appropriate boxes. ****Do NOT enter dollar amounts. These benefits do NOT get counted as income, and receiving them does NOT hurt your eligibility for financial aid**** If none of the items apply to your household, check box "1".

Benefit Type A-E	2021-2022	2023 - Current	Benefit Type F-J	2021-2022	2023 - Current
a. Food Stamps/SNAP	<input type="checkbox"/>	<input type="checkbox"/>	f. Untaxed Social Security	<input type="checkbox"/>	<input type="checkbox"/>
b. Welfare/TANF	<input type="checkbox"/>	<input type="checkbox"/>	g. Subsidized Housing	<input type="checkbox"/>	<input type="checkbox"/>
c. Supplemental Security Inc. (SSI)	<input type="checkbox"/>	<input type="checkbox"/>	h. Child Care Assistance	<input type="checkbox"/>	<input type="checkbox"/>
d. Free or Reduced Lunch	<input type="checkbox"/>	<input type="checkbox"/>	i. Medical Assistance (e.g., Medicaid/Apple Health)	<input type="checkbox"/>	<input type="checkbox"/>
e. WIC	<input type="checkbox"/>	<input type="checkbox"/>	j. Utility Assistance	<input type="checkbox"/>	<input type="checkbox"/>

k. If student and/or spouse attended college in any of the years listed below **and** received financial aid that helped pay your living expenses, complete the following (note: does not affect your eligibility for financial aid):

Student: 2021 2022 2023 College Name[s] _____

Spouse: 2021 2022 2023 College Name[s] _____

l. None of the above (items a- k) applies to myself or my household members.

2. STUDENT UNTAXED INCOME:

Instructions: Answer each of the following about **YOURSELF (and spouse if married)**. If they do not apply to you, enter zeros. **Do not include benefit types listed in question 1.** (Enter amount for the year 2021, rounded to the nearest dollar)

Yearly Amount	Source of Untaxed Income
\$	a. Child support <u>received in 2021</u>
\$	b. Worker's Compensation
\$	c. Payments to tax-deferred pension & savings <u>list source:</u> _____ (see help below)
*Help for c (above): List payments (direct or withheld from earnings) to tax-deferred pension & retirement savings plans (e.g., 401(k) or 403(b) plans), incl., but not limited to, amounts reported on W-2 forms in Boxes 12a - 12d with codes D, E, F, G, H, & S. Don't include amounts reported in code DD.	
\$	d. Living allowance paid to clergy or military (military: include only BAS, do not include BAH)
\$	e. Veterans non-education benefits (incl: Disability, Death Pension, DIC, VA Work-Study allowances)
\$	f. Any other <u>untaxed</u> income NOT included on tax return <u>list source:</u> _____
\$	g. List any money received or paid on the student's behalf (e.g., payment of student's bills) that is not reported elsewhere on this form. (See help below) Also, list the sources & the purpose of the payments: _____

***Help for g (above):** Enter the total amount of **cash support** the student (&/or spouse) received in 2021. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions. Also, include any distributions to the student from a 529 plan owned by someone other than the student, such as parents, grandparents, aunts, & uncles of the student.

Verification Worksheet
Federal Student Aid Programs

E. ADDITIONAL FINANCIAL INFORMATION - INCOME EXCLUSIONS page 4 of 4

➔ Answer each item in this section. Do not leave any item blank. If you have questions, please contact our office for assistance.

1. STUDENT INCOME EXCLUSIONS:

The 2023-2024 FAFSA refers to "Additional Financial Information" for **2021**. The financial aid office must verify the dollar amounts from the **2021** calendar year. Please answer each of the following. If they do not apply to you (and/or spouse if married), enter zeros, or check "NO".

Yearly Amount	Exclusion Type (if you have questions about any of these items, please contact our office)
\$	Taxable earnings from Federal or State Work-study . (Attach W-2 of work-study earnings from college) <i>If any college employed you as a work-study student, you would have received a W-2 for your 2021 earnings</i>
\$	Combat Pay or Special combat pay. <i>List ONLY the taxable portion reported in the AGI on your 2021 tax return.</i>
\$	Rollovers (of IRA & other pensions). <i>List ONLY the taxable portion reported in the AGI on your 2021 tax return.</i>
<input type="checkbox"/> No <input type="checkbox"/> Yes* Child Support PAID to others in 2021 . Do NOT include support you received. *If YES, complete worksheet below	

Who paid Child Support	Name of Person to whom Child Support was paid:	Name of Child for whom support was paid	Age of child	Amount of Child Support Paid in 2021
<input type="checkbox"/> Student <input type="checkbox"/> Spouse				\$
<input type="checkbox"/> Student <input type="checkbox"/> Spouse				\$
<input type="checkbox"/> Student <input type="checkbox"/> Spouse				\$
Total				\$

Sign This Worksheet

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct.

Student _____	Date _____
Spouse (optional, not required) _____	Date _____

Return this completed form **(with required documents)** to:
Wenatchee Valley College | Phone 509-682-6810
 Financial Aid Office | Fax 509-682-6811
 1300 5th Street – Wenatchi Hall | Email: financialaid@wvc.edu
 Wenatchee WA 98801 | <http://www.wvc.edu>

Tips to avoid delays in processing:

- Before submitting, review the entire form. Make sure that:
 - You completed all four pages
 - There are no unanswered questions
 - All questions are answered accurately
 - You have signed and dated this page
 - You have attached all required **SIGNED** tax returns or IRS transcripts, W2's, etc.
 - If you used the IRS Data Retrieval Tool to transfer tax data, check your updated FAFSA Student Aid Report to verify the transfer and submission went through. Our office uploads new transactions weekly. You can view and check your new transaction online at FAFSA.gov as soon as it is processed.