



# 2023-2024 Verification Worksheet— Independent Student

Sweet Briar, Virginia 24595 • (800) 381-6156 • Fax: (434) 381-6450 • [financialaid@sbc.edu](mailto:financialaid@sbc.edu) • [sbc.edu](http://sbc.edu)

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your spouse reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with your 2021 federal tax information. If there are differences, your FAFSA information may need to be corrected and corrections could affect the student federal eligibility. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Sweet Briar College Financial Aid may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

## WHAT HAPPENS AFTER I SUBMIT MY INFORMATION?

Once you begin submitting documentation, the Financial Aid Office will:

1. Review documents to be sure they are complete
2. If the documents are incomplete (missing signatures, questions left blank, etc.) or raises additional questions or discrepancies for which we will need clarification, we will request that the documents be resubmitted or request additional documentation. NOTE: Requests for missing information will show up in your MySBC account.
3. Once all documents are complete, the Financial Aid office will review the information and compare it with the information reported on the FAFSA.

## HOW TO USE THE IRS DATA RETRIEVAL TOOL:

1. Go to [www.fafsa.gov](http://www.fafsa.gov)
2. Click the Login Button on the right side of the screen
3. Enter your information and click "Next"
4. Click on "Make Corrections to a Processed FAFSA"
5. Click on the "Financial Information" tab
6. Answer "Already Completed" to the question have your parents filed their IRS Income tax return, then by checking "None of the above" if that is accurate to the next question about the filing status, the "Link to IRS" button will appear. (If you cannot accurately check none of the above, you will need to submit an IRS Tax Transcript.)
7. Click on the "Link to IRS" button (you will be directed that you are leaving the FAFSA webpage).
8. Enter the information asked by the IRS page and then click "Transfer Now" to FAFSA.

## HOW TO OBTAIN A TAX RETURN TRANSCRIPT OR CONFIRMATION OF NONTAX FILER STATUS FROM THE IRS:

1. Be sure to request a Tax Return Transcript, NOT an Account Transcript
2. Do NOT have transcripts sent directly to the Financial Aid Office
3. To request a copy online, enter [www.irs.gov](http://www.irs.gov) and follow these steps:
  - a. On the main page under Tools, click "Get Transcript of your Tax Records"
  - b. Click "Get Transcript Online" or "Get Transcript by Mail"
  - c. Click "Get Started" and enter your information (you will not see this prompt if requesting by mail; fill out all fields)
  - d. Check the email account that you entered for the Confirmation Code (Do not close the IRS page)
  - e. Enter the Confirmation Code in the space provided on the IRS page and click "Verify Email Confirmation Code"
  - f. Enter the Information on the next two pages
  - g. Click on the year transcript that you wish to print. Your transcript will open in a new window where you can print it.
4. Telephone Request: Automated 1-800-908-9946
5. Paper Request: IRS form 4506-T – Must be used if you have moved since filing your taxes.  
The form can be downloaded at [www.irs.gov](http://www.irs.gov).

## A. INDEPENDENT STUDENT'S INFORMATION

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Number

## B. INDEPENDENT STUDENT'S FAMILY INFORMATION

List below the people in your household. Include:

- The student. (Yourself)
- Your spouse.
- Any children that 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 parental information for you if they were completing a FAFSA for 2023-2024. 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 your spouse, or if you and your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.
- Number in College: Include the name of the college for any household member who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023 and June 30, 2024.

Full Name:	Age:	Relationship:	Will be attending college at least half time in 2023-24?	Name of College:	Undergraduate or Graduate:
Miss Jones (example)	18 (example)	Sister (example)	Yes (example)	Sweet Briar College	Undergraduate
		Self			

## C. INCOME TAX INFORMATION TO BE VERIFIED

Student's Income Information (check one box only)	Spouse's Income Information (check one box only)
If you did not file a US income Tax Return in 2021: <input type="checkbox"/> Check here if confirmation of non-filing is provided (Form 4506-T) <input type="checkbox"/> Check here if confirmation of non-filing will be provided later. ➡ Continue to Section D	If you did not file a US income Tax Return in 2021: <input type="checkbox"/> Check here if confirmation of non-filing is provided (Form 4506-T) <input type="checkbox"/> Check here if confirmation of non-filing will be provided later. ➡ Continue to Section D
If you did not use the IRS Data Retrieval Tool: <input type="checkbox"/> Check here if you will update you FAFSA by using the IRS Data Retrieval Tool (see instructions). <input type="checkbox"/> Check here if you did not complete the IRS Data Retrieval Tool and have attached a copy of your IRS Tax Return Transcript (see instructions). ➡ Skip to Section E	If you did not use the IRS Data Retrieval Tool: <input type="checkbox"/> Check here if you will update you FAFSA by using the IRS Data Retrieval Tool (see instructions). <input type="checkbox"/> Check here if you filed " <u>married filing separately</u> " or <u>did not complete the IRS Data Retrieval Tool</u> . Please attach a copy of your IRS Tax Return Transcript (see instructions). ➡ Skip to Section E
<input type="checkbox"/> Check here if you were not eligible to use the IRS Data Retrieval Tool. You <b>MUST</b> attach a copy of your tax return transcript to this form (see instructions). ➡ Skip to Section E	<input type="checkbox"/> Check here if you were not eligible to use the IRS Data Retrieval Tool. You <b>MUST</b> attach a copy of your tax return transcript to this form (see instructions). ➡ Skip to Section E

Student's Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**D. EARNED INCOME INFORMATION — (PLEASE COMPLETE ONLY IF YOU DID NOT FILE A TAX RETURN):**

In the space below, list all employers and earned income from 2021 for the person that did not file a tax return. Also, please attach 2021 W-2s to this form. List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

Employer Name	Student Amount	Spouse's Amount	IRS W2 – Attached?	
	\$	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	\$	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	\$	\$	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**E. CHILD SUPPORT PAID — DO NOT LEAVE THIS BLANK, IF NOT APPLICABLE, ENTER N/A**

I certify that I paid child support in 2021. I have listed below the names of the person to whom the child support was paid, the names of the children for whom the child support was paid, and the total amount of child support paid in 2021 for each child. I attest that I have not included these children as members of my household size. (Parents can either include these children as members of the household \*OR\* include the amount of child support paid for these children – not both).

Child's Name	Name of Person paying support	Name of person receiving child support	Amount paid during the 2021 year
			/Year
			/Year
			/Year
			/Year

**F. UNTAXED INCOME - DO NOT LEAVE THIS BLANK, IF NOT APPLICABLE, ENTER N/A**

Sources of Untaxed Income	Student 2021 Amount	Spouse's 2021 Amount
Are the IRA Distributions from your IRS 1040 or 1040A a rollover amount?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are the Pension Distributions from your IRS 1040 or 1040A a rollover amount?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**G. CERTIFICATION AND SIGNATURES**

Do not mail this worksheet to the U.S. Department of Education.

Submit this worksheet to the Sweet Briar College Financial Aid Office at the address below. Keep a copy for your records.

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and spouse must sign and date. **WARNING: IF YOU PURPOSELY GIVE FALSE OR MISLEADING INFORMATION ON THIS WORKSHEET, YOU MAY BE FINED, BE SENTENCED TO JAIL, OR BOTH.**

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

Sweet Briar College Financial Aid Office  
P.O. Box 1095  
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Fax: 434-381-6450  
Email: financialaid@sbc.edu