

Office of Financial Aid at Rider University  
2083 Lawrenceville Road, Lawrenceville, NJ 08648

## 2022-2023 Verification Worksheet

### DEPENDENT Student

Your 2022–2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that before awarding any Federal Student Aid, we must ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information, the financial aid office will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information will be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and the other required documents to the financial aid office at Bart Luedeke Center, 2<sup>nd</sup> Floor or submit via MappingXpress. If you have any questions concerning this process, please contact the Office of Financial Aid at (609) 896-5360. **You must complete each part in its entirety and print clearly with the student's Bronc ID on each page.** The verification process will not be completed if this form is incomplete and/or if documents are missing.

#### A. STUDENT INFORMATION

Name (last name, first name, middle initial)

Student Bronc ID #

Address

Home Phone (123) 456-7890

City

State

Zip Code

Date of Birth

#### B. INFORMATION ABOUT FAMILY MEMBERS

*Number of Household Members:* List below the people in the parents' household. Include:

- Yourself and your parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2022, through June 30, 2023, or if the other children would be required to provide parental information if they were completing a FAFSA for 2022–2023. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2023.

*Number in College:* Include in the space below information about any household member who is, or will be, enrolled in *at least 6 credits* in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2022, and June 30, 2023, and include the name of the college. (Please do not include any parents' college information.)

Name of Family Member	Relationship To Student	Date of Birth	College in 2022-2023	Will attend at least half time (6 credits)	Expected Year of Graduation
Jane Doe (Example)	Sister	2/11/02	Central Univ.	Yes	2025
	Self		Rider Univ.		

\*\* If more space is needed, provide a separate page with the student's name and ID number at the top.

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

**C. STUDENT INCOME INFORMATION**

**Did you file a federal income tax return for 2020?** ☐ YES ☐ NO

(IRS form 1040, Schedules 1, 2, or 3 or appropriate form from country of residence)

**If YES**, complete this section. *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. You will still need to provide all 2020 W2's regardless if you used the DRT.

**Check the box that applies:**

- ☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.
- ☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student's FAFSA (instructions included).
- ☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2020 IRS Tax Return Transcript(s)** (instructions included).

\_\_\_\_\_ Check here if a **2020 IRS Tax Return Transcript(s)** is provided with this worksheet.

\_\_\_\_\_ Check here if a **2020 IRS Tax Return Transcript(s)** will be provided later.

**If NO**, complete this section.

**Check the box that applies:**

- ☐ The student was not employed and had no income earned from work in 2020.
- ☐ The student was employed in 2020 and has listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. *Provide copies of all 2020 IRS W-2 forms issued to the student and spouse by their employer. List every employer even if the employer did not issue an IRS W-2 form.*

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2020
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

**I certify that I DID NOT, I WILL NOT, and I AM NOT REQUIRED TO file a federal tax return for 2020.**

\_\_\_\_\_  
Student's signature (*only if statement applies*)

\_\_\_\_\_  
Date

**D. PARENT(S)' INCOME INFORMATION**

**Note:** The instructions below apply to each parent included in the household in Section B.

**Did the student's parent(s) file a federal income tax return for 2020?** ☐ YES ☐ NO

(IRS form 1040, Schedules 1, 2 or 3 or appropriate form from country of residence)

**If YES**, complete this section. *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's

FAFSA using the IRS DRT if that information was not changed. Your parent will still need to provide all 2020 W2's regardless if you used the DRT.

**Check the box that applies:**

- ☐ The student's parent has used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.
- ☐ The student's parent has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student's FAFSA (instructions included).
- ☐ The student's parent is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2020 IRS Tax Return Transcript(s)** (instructions included).

If the parents filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s)** must be provided for each.

\_\_\_\_\_ Check here if a **2020 IRS Tax Return Transcript(s)** is provided with is worksheet.

\_\_\_\_\_ Check here if a **2020 IRS Tax Return Transcript(s)** will be provided later.

If **NO**, complete this section. The instructions and certifications below apply to each parent included in the household.

**Check the box that applies:**

- ☐ Neither parent was employed, and neither had income earned from work in 2020.
- ☐ One or both parents were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. *Provide copies of all 2020 IRS W-2 forms issued to the parents by their employer. List every employer even if the employer did not issue an IRS W-2 form.*

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2020
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

Provide Verification of Non-filing Letter from the IRS or other relevant tax authority for 2020 (instructions included).

\_\_\_\_\_ Check here if confirmation of non-filing is provided with this worksheet.

\_\_\_\_\_ Check here if confirmation of non-filing will be provided later.

**I certify that I DID NOT, I WILL NOT, and I AM NOT REQUIRED TO file a federal tax return for 2020.**

\_\_\_\_\_  
Parent 1 signature (*only if statement above applies*)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent 2 signature (*only if statement above applies*)

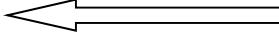
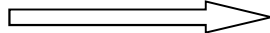
\_\_\_\_\_  
Date

**E. UNTAXED INCOME FOR 2020**

**Did you and/or your parent(s) receive any untaxed income and benefits for 2020?** ☐ YES ☐ NO

If **YES**, complete the following and **provide the appropriate documentation**.

All amounts and documentation must be for the **entire year of 2020**. Do **not** provide a monthly statement of current benefits.

Student	2020 Untaxed Income	Parent
	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D,E,F,G,H and S.	
	Child support received for all children. Don't include foster care or adoption payments.	
	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing (BAH/BAQ).	
	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work Study allowances.	
	Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce investment Act educational benefits, on-base military housing or a military housing allowance, combat pay (if your parents are not tax filers), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	
	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	
	 <b>Totals</b> 	

**F. CHILD SUPPORT PAYMENTS**

Did the parent(s) listed on this document pay child support for non-custodial children in 2020? ☐ YES ☐ NO

If **YES**, complete the following chart. List support for children who did **not** reside with your parent(s) but to whom your parent(s) were required to provide monies per a divorce or separation agreement. These children cannot be listed in B.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2020

Note: We may require additional documentation if we have reason to believe that the information regarding child support paid is inaccurate.

**G. CERTIFICATION AND SIGNATURES**

**WARNING: IF YOU PURPOSELY GIVE FALSE OR MISLEADING INFORMATION ON THIS FORM, YOU MAY BE FINED, SENTENCED TO JAIL, OR BOTH.**

By signing this form, we certify that all the information reported on it is complete and correct.

\_\_\_\_\_  
Student's signature (**Required**)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's signature (**Required**)

\_\_\_\_\_  
Date



The enclosed **Dependent** Verification Document details the information you must submit to our office. Please read the form carefully, follow the instructions, and **do not leave any items blank**. Be sure to also provide the following:

- Your complete 2020 IRS tax return transcript if you filed and did NOT SUCCESSFULLY use the IRS Data Retrieval Tool (DRT) (*instructions on back*).
- A copy of your 2020 W-2 Form(s).

and

- Your parent(s)' complete 2020 IRS tax return transcript if they filed and did NOT SUCCESSFULLY use the IRS Data Retrieval Tool (DRT) (*instructions on back*).
- A copy of your parent(s)' 2020 W-2 Form(s).

**If your parent(s) did not file a 2020 Federal Tax Return, they are required to provide the financial aid office a Verification of Non-Filing Letter obtained from the IRS** (*instructions on back*) or they can go the local IRS office.

Note: This letter just confirms that the IRS does not have a tax return on record. This letter does not mean that you were not required to file a return.

To ensure compliance, we will not disburse any funds until the verification process has been completed. Failure to submit all requested information will result in cancellation of your financial aid. If you have any questions about this process, please contact our office.

Sincerely,

Office of Financial Aid

(additional information on reverse side)

## DATA RETRIEVAL INSTRUCTIONS

The easiest and fastest way to complete your verification is to use the IRS Data Retrieval (DRT) on your completed FAFSA. If you did not use the IRS DRT, follow the steps below in order to do so.

=> Go to [www.fafsa.gov](http://www.fafsa.gov)

=> Click on "Login."

=> Enter the student's name, social security number, and date of birth and click "Next."

=> Select the 2022/2023 FAFSA and click on "Make FAFSA Corrections."

=> Enter the Student's FSA ID and password and click "Next."

=> Navigate to the "Financial Information" section of the FAFSA.

=> Update the filing status of your and/or your parents IRS income tax return. Make sure "Already completed" is selected and click "Next."

=> You will be presented with a series of questions that will determine your eligibility to use the Data Retrieval Tool.

Once you are presented with the option to enter your FSA ID and "Link to IRS" complete the information and click "Link to IRS." You then will be directed to the IRS website.

=> Once on the IRS website, enter the requested information as it appears on your tax return. If the IRS is able to validate your identification your tax information will be displayed. Select "Transfer My Tax Information into the FAFSA" and then click on "Transfer Now."

=> You will be re-directed back to FAFSA.

=> **When completed, continue on to the Sign and Submit section of FAFSA and submit your corrections "SUBMIT MY FAFSA NOW".**

## Tax Return Transcript AND Verification of Non-filing from the IRS

<b>Verification of Non-Filing</b> A non-filer is any student or parent (not filing a joint return) who did not work or did work, but did not file a 2020 Federal Income Tax Return. For the 2022-2023 academic year any parent or independent student who is a non-filer is required to provide a Verification of Non-Filing Letter from the IRS and all 2020 W2's from each employer. A request to the IRS for the Verification of Non-Filing Letter can be made using the IRS "Get Transcript Online" tool at <a href="http://www.irs.gov/Individuals/Get-Transcript">www.irs.gov/Individuals/Get-Transcript</a> or by submitting IRS Form 4506-T and checking box 7.	<b>Request Transcript Online</b> Go to <a href="http://www.irs.gov">www.irs.gov</a> Select "Get My Tax Record" Under <i>Tools</i> select "Get a Transcript Online or by mail" Follow prompts: Make sure to request a Tax Return Transcript for year 2020. You should receive your transcript in 5-10 business days.
<b>Transcript by Mail</b> Complete Form 4506-T (Request for Transcript of Tax Return) Form 4506-T is available online at <a href="https://www.irs.gov/pub/irs-pdf/f4506t.pdf">https://www.irs.gov/pub/irs-pdf/f4506t.pdf</a>	<b>Transcript by Phone</b> Call the IRS at 1-800-829-1040 Follow prompts: Option 2 (Personal income taxes) Option 1 (tax history) Option 2 (Tax Return Transcript) Enter and verify Social Security number(s) Enter and verify street address Press 2 for Tax Transcript and indicate which year: 2020

*Note:* You may also schedule an appointment with your local IRS office for any of these documents. For a list of offices near you, search [irs.gov](http://irs.gov) for local offices in your state.