

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 parents' **2020** 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/>	<hr/>	<hr/>	SSN: <hr/>
<small>Last Name</small>	<small>First Name</small>	<small>MI</small>	
<hr/>	<hr/>	<hr/>	SID: <hr/>
<small>Address (include apt # if applicable)</small>	<small>Date of Birth</small>		
<hr/>	<hr/>	<hr/>	<hr/>
<small>City</small>	<small>State</small>	<small>ZIP Code</small>	<small>Daytime Phone (include area code)</small>

Use this checklist to ensure you complete all steps – INCOMPLETE FORMS CANNOT 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.*
 - BOTH STUDENT AND PARENT MUST SIGN THE WORKSHEET** (must be a parent whose data is on FAFSA)
 - 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 parents' household, contact the financial aid office.****

Include the following in your parent or parents' household:

- Yourself (**list yourself first, on line designated "STUDENT"**)
- Your legal parent or parents* (even if you live on your own).
Regardless of gender or marital status, include both legal parents who live together. Include stepparent if legal parent has remarried.
- Your parents' other dependent children (under age 24), **if your parents will provide more than half of their support from July 1, 2022 through June 30, 2023.**

Include other people in your parents' household ONLY IF:

- They are currently living with your parents, **and** your parents provide more than half of their support **and** will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.
Documentation of support may be required.

*****Please be consistent with reference to Parent #1 and Parent #2 throughout this form.*****

Full Name	Age	Relationship	College
<i>(example) Martha Jones</i>	<i>24</i>	<i>Mother</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. STUDENT INFORMATION

- ➔ Read carefully and follow the instructions in each section. If you have questions, please contact our office.
- ➔ **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 [FAFSA.gov](https://fafsa.gov), log in, select "Make FAFSA Corrections," and navigate to the Financial Information section. Follow instructions. Make sure you save, sign and submit the FAFSA when complete.
 - B. Official Tax Return Transcript:** You can request a **FREE** 2020 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".
 - ➔ Please note that we may request other documents to verify additional information as we deem necessary. ←

1. STUDENT EARNED INCOME INFORMATION & TAX INFORMATION:

a. TAX-FILERS: Check ONE box and follow directions – if you have questions, contact the financial aid office

I am attaching a **SIGNED** copy of my 2020 IRS tax return **or** official IRS transcript.

I used the IRS Data Retrieval Tool (*see instructions at top of page*) to transfer my 2020 tax information to my FAFSA **& MADE NO CHANGES TO THE DATA RETRIEVED**. **Date this was done:** _____

I filed an **AMENDED** tax return after my initial 2020 tax return. **Attach BOTH a signed copy of IRS tax form 1040X AND one of the following showing initial return info:** Tax Return Transcript Signed copy of IRS tax return

b. NON-FILERS: If you will not file and are not required to file, complete the following.

NON-FILER: I (Student) will **not file - and am not required to file** - a 2020 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 2020 Yes* No
 *If "YES", list all employer(s) & income received in 2020 and attach copies of all W-2s. (attach add'l sheet if needed)

List all Employer[s]	**CHECK ONE
	\$
	\$

2. STUDENT UNTAXED BENEFITS/ASSISTANCE:

Instructions: If you received any of these items **in your name - NOT in your parents name** - 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, check box "l".

Benefit Type A-E	2020-2021	2022 - Current	Benefit Type F-J	2020-2021	2022 - 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 you (student) attended college in any of the years listed below **and** received financial aid that helped pay your living expenses, complete the following: 2020 2021 2022 College Name[s] _____

l. None of the above (items a-k) applies to me.

Verification Worksheet
Federal Student Aid Programs

C. STUDENT INFORMATION cont. **page 3 of 6**

➔ Answer #3 and #4, following the instructions for each. If you have questions, please contact our office for assistance.

3. STUDENT UNTAXED INCOME:

Instructions: Answer each of the following about **YOURSELF (not your parents)**. If they do not apply to you, enter zeros. **Do not include benefit types listed in question 2 (pg 2).** (Enter amount for the year 2020, rounded to nearest dollar)

Yearly Amount	Source of Untaxed Income
\$	a. Child support <u>received in 2020</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. (not 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) <u>Also, list the source & the purpose of the payments below:</u>

***help for g (above):** Enter the total amount of **cash support** that you (the student) received in 2020 from anyone other than your parents. For example, if someone is paying rent, utility bills, etc., for you 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.

4. STUDENT INCOME EXCLUSIONS:

The 2022-2023 FAFSA refers to "Additional Financial Information" for **2020**. The financial aid office must verify the dollar amounts from the **2020** calendar year. Please answer each of the following. If they do not apply to you, 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. If any college employed you as a work-study student, you would have received a W-2 for your 2020 earnings.)
\$	Student grant and scholarship aid (in excess of the tuition, fees, books, and supplies) that was reported to the IRS as part of adjusted gross income (AGI) on your 2020 tax return. If none reported on tax return, enter "0" .
\$	Rollovers (of IRA & other pensions). List ONLY the taxable portion reported in your AGI on your 2020 tax return.
<input type="checkbox"/> No <input type="checkbox"/> Yes* Child Support PAID to others in 2020 . Do NOT include support you receive. * 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 2020
<input type="checkbox"/> Student				\$
<input type="checkbox"/> Student				\$
Total				\$

THIS IS THE END OF THE STUDENT SECTION
PARENT SECTION BEGINS ON PAGE 4
STUDENT & PARENT MUST SIGN THE WORKSHEET (bottom of page 6)

Verification Worksheet
Federal Student Aid Programs

THIS IS THE BEGINNING OF THE PARENT SECTION. PAGES 1-3 ARE THE STUDENT SECTION.
ALL SECTIONS MUST BE COMPLETED - STUDENT & PARENT MUST SIGN THE WORKSHEET (bottom of page 6)

D. PARENT INFORMATION ****READ INSTRUCTIONS CAREFULLY BEFORE COMPLETING**** page 4 of 6

- **Tax-filers:** You will complete either Section A or Section B, depending on the method used to verify income.
- A. **IRS Data Retrieval Tool (DRT):** Use of the DRT is optional. If you wish to use the DRT to verify your income, read Section A first to see if you meet the criteria. If you do, complete section A.
 - B. **In all other circumstances, parents who filed taxes MUST complete section B, even** if you did use the DRT to transfer tax information. To complete section B, you will need to provide one of the following:
 - 1) **Tax Return Transcript:** You can request a **FREE** 2020 tax return transcript online at www.irs.gov (keep original, submit copy to us) **OR**
 - 2) **SIGNED Copy of Filed Tax Return:** Include copies of ALL schedules submitted with filed return
- **NON tax-filers:** Complete Section C below. 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, you can also use 4506-T to request a "Form W2 Transcript".

1. PARENT 2020 TAXES AND INCOME:

A. **Tax-filers:** If you meet the household, tax **and** DRT criteria below complete this section. Otherwise, you must complete section "B". ***Note: If taxes were filed using an ITIN, skip section "A", complete section "B"***

1) The Parent status in 2020 **and** still is:

- One parent household, where Parent filed a Single or Head of Household 2020 tax return and did not later amend it.
- Two parent household, where Parents filed **one joint** 2020 income tax return and did not later amend it.

2) **AND**

The IRS Data Retrieval Tool was used to transfer PARENTS' 2020 tax information to FAFSA **& THERE WERE NO CHANGES MADE TO THE DATA.** **Date this was done:** _____ (Do not submit any tax documents unless requested by us.)

***Instructions for the DRT:** Go to FAFSA.gov, log in, select "Make FAFSA Corrections," and navigate to the Financial Information section. Follow the instructions. Make sure you save, sign and submit the FAFSA when complete.

B. **Tax-filers:** If you are using **Tax Returns or Tax Transcripts** to verify tax information, check the appropriate box below and *attach copies of parents' 2020 IRS tax return transcript[s] or SIGNED copy of tax return[s]*. Follow additional instructions as noted. *If none of the scenarios listed below apply to you, contact our office.*

- One parent household - Parent filed 2020 federal income tax return as Single or Head of Household.
- One parent household - Parent filed **joint** 2020 tax return but is now a single parent (**contact our office**).
- Two parent household - Parents filed one **joint** 2020 federal income tax return.
- Two parent household - Parents filed **separately**. (**Attach BOTH returns. Complete "C" if one was a non-filer.**)
- One or both parents filed an **AMENDED** return after the initial 2020 tax return. *Attach a **SIGNED copy of IRS form 1040X AND either a Tax Return Transcript OR a Signed copy of IRS tax return showing the initial tax return info.** ****Must also provide the non-amended return if filed separately and only one was amended*****

C. **NON-FILERS ONLY:** Complete this section **only** if one or both parents will **not** file a 2020 income tax return ****Attach copies of all W-2s. Also attach a "Verification of Non-filing" letter from the IRS for each non-filer.****

Parent #1 Parent #2 did not file, **and is not required to file** a 2020 tax return. **For each parent that did not file, check one box below.** If the answer is "YES" for either parent, list all employer(s) & income received in 2020.

**** (attach add'l sheet if necessary)****

	List all Employer[s]	Total Income
Parent #1 had earned income in 2020 <input type="checkbox"/> Yes <input type="checkbox"/> No		\$
Parent #2 had earned income in 2020 <input type="checkbox"/> Yes <input type="checkbox"/> No		\$

Verification Worksheet
Federal Student Aid Programs

D. PARENT INFORMATION cont. page 5 of 6

➔ Answer #2 and #3. Please read instructions first. If you have questions, please contact our office for assistance.

2. PARENT UNTAXED BENEFITS/ASSISTANCE:

Instructions: Complete for all members of parents' household listed on page 1. (exception: if student receives any of these in their own name, do not enter here, enter in student section). ****Do not enter amounts. These benefits are NOT counted as income and receiving them does NOT hurt your eligibility for financial aid.**** If none of the items apply, check box "1".

Benefit Type A-E	2020-2021	2022 - Current	Benefit Type F-J	2020-2021	2022 - 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 Programs	<input type="checkbox"/>	<input type="checkbox"/>

k. If parent[s] attended college in any timeframe below, **and** received financial aid that helped pay living expenses, please note:
 2020 - Current Parent Name : _____ College Name[s] _____
 2020 - Current Parent Name : _____ College Name[s] _____

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

3. PARENT UNTAXED INCOME RECEIVED IN 2020:

Instructions: Enter amounts for each item, a-g. If they do not apply, enter zeros. **Do not include any of the benefit types listed in question 2.** (Enter amount for the entire year 2020, rounded to the nearest dollar)

Yearly Amount	Source of Untaxed Income
\$	a. Child support received in 2020
\$	b. Worker's Compensation
\$	c. Payments to tax-deferred pension & savings list source: _____ (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 untaxed income (NOT included on tax return) that is not reported elsewhere on this form. (see help below) Also, list the source & the purpose of the payments: _____

***help for f (above):** Enter any other untaxed income received in 2020 **that is not reported elsewhere on this form.** This would include money received directly or indirectly, such as if someone else is paying (or contributing towards) rent, utility bills, etc., include the amount of that person's contributions. This also includes cash received, gift cards, etc.

Verification Worksheet
Federal Student Aid Programs

D. PARENT INFORMATION cont.

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

4. PARENT INCOME EXCLUSIONS:

Instructions: The 2022-2023 FAFSA refers to “Additional Financial Information” for **2020**. The financial aid office must verify the dollar amounts from the **2020** calendar year. Please answer each of the following for the parent(s). If they do not apply to the parent(s), 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 parent[s] as a work-study student, you would have received a W-2 for your 2020</i>
\$	Student grant and scholarship aid (in excess of the tuition, fees, books, and supplies) reported to the IRS as part of parent(s) adjusted gross income (AGI) on the 2020 tax return. <i>If none reported on return, put “0”.</i>
\$	Combat Pay or Special combat pay. <i>List ONLY the taxable portion reported in the AGI on your 2020 tax return.</i>
\$	Rollovers (of IRA & other pensions). <i>List ONLY the taxable portion reported in the AGI on your 2020 tax return.</i>
<input type="checkbox"/> No <input type="checkbox"/> Yes* Child Support PAID to others in 2020 . 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 2020
				\$
				\$
				\$
				\$
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
Parent (required – one parent whose data is on FAFSA)	Date

Return this completed form **(with required documents)** to:

Wenatchee Valley College	Phone 509-682-6810
Financial Aid Office	Fax 509-682-6811
1300 5 th 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:
 - There are no unanswered questions
 - You were consistent with regard to Parent #1 & #2 throughout both the FAFSA and this worksheet**
 - All questions are answered accurately
 - Both Student and one Parent have signed and dated this page (Parent must be listed on FAFSA)
 - You have attached all required **SIGNED** tax returns, 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.