



2023-2024 Verification Worksheet for an Independent Student ^{1V122}

Your Free Application for Federal Student Aid (FAFSA) was selected for Verification. Evergreen is required to compare information from your FAFSA with your 2021 IRS tax transcript or IRS Data Retrieval Tool and/or other financial documents. Federal and State Law requires that this is done before disbursement of financial aid (34 CRF Part 668).

Full Name: _____ Phone: _____ Evergreen ID: _____

Mailing Address: _____ City: _____ State: _____ ZIP: _____

SECTION 1. FAMILY INFORMATION

List below the people in your household. Include:

- Yourself and your spouse if married.
- Your children if you will provide more than half of their support from July 1, 2023, through June 30, 2024, or if your children would be required to provide your information if they were completing a FAFSA for 2023-2024.
- Other people if they live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Your Name:	Date of Birth	College Attending in 2023-2024

Spouse's Name	College Attending in 2023-2024

Other family members in household (see details above) If more space is needed, attach a separate page.

Full Name	Date of Birth	Relationship to student	College Attending in 2023-2024

SECTION 2. 2021 TAX AND WAGE INFORMATION (If you have already submitted 2021 information for 2022-2023, contact our office)

Please check one box that applies to you and provide the requested documentation. Please see the attached instruction sheet.

- I have filed taxes and have or will use the IRS Data Retrieval Tool to transfer my tax information to my FAFSA.
- I have filed taxes and I will provide a copy of my 2021 Tax Return Transcript from the IRS.
- I filed a 2021 tax return and have some income from self-employment and I will provide a 2021 Tax Return Transcript from the IRS and copies of all schedule K-1 (Form 1065) and W2's if applicable.
- I worked in 2021 but am not required to file 2020 taxes and will provide 2021 W2's and a Verification of Non-Filing from the IRS.
- I did not work in 2021 and will provide a Verification of Non-Filing from the IRS.

Office of Financial Aid



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Full Name: _____ Evergreen ID: _____

SECTION 3. FOR 2021 ADDITIONAL FINANCIAL INFORMATION

ENTER ANNUAL AMOUNTS OR \$0	STUDENT	SPOUSE
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employments portions of fellowships and assistantships.	\$	\$
Taxable college grant and scholarship aid reported to the IRS . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.	\$	\$
Earnings from work under a cooperative education program offered by a college.	\$	\$

SECTION 4. FOR 2021 UNTAXED INCOME (Enter the combined amounts for you and your spouse.)

ENTER ANNUAL AMOUNTS OR \$0	STUDENT	SPOUSE
Payments to tax-deferred pension and retirements savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions towards employee health benefits).	\$	\$
Child support received for any of your 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.	\$	\$
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 benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements, 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.	\$	\$

Certification and Signatures WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. Each person signing this worksheet certifies that all of the information reported on it is complete and correct. Student must sign and date this worksheet. Spouse is optional.

Student's Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____



evergreen
OLYMPIA, WASHINGTON

TAX AND WAGE INFORMATION INSTRUCTION SHEET

Keep this page for your records

Please read carefully before completing the verification process. We cannot review your financial aid file until we have received all the requested information. Incomplete or missing documents may delay your financial aid award.

If you have already submitted 2020 income information for your 2022-2023 file, contact our office.

- I have filed taxes and have or will use the IRS Data Retrieval Tool to transfer my tax information to my FAFSA.
-This means you have successfully transferred data from the IRS to your FAFSA. To do this, logged into your FAFSA, under the income section you will be asked a series of questions to see if you are able to transfer the information. If you are able, the site will take you from your FAFSA to the IRS site. You must use the address listed on your 2021 taxes and must list the main person who filed the return for the tool to work properly. Be sure to click transfer! The site will then take you back to your FAFSA, but you will not be able to see what information was transfer. That's ok! Do not change the information.
- I have filed taxes and I will provide a copy of my 2021 Tax Return Transcript.
You may go to the IRS Website at www.irs.gov and click on "Get My Tax Record," then choose the transcript online or by mail. You need to use the address listed on your tax return and list the main person who filed the return for this option to work properly. You may also fill out Form 4506-T and send that to the IRS to get a copy by mail. If you are not able to obtain one, we can accept a sign copy of your 1040 form. If you amended your taxes after you filed, we will also need a signed copy of your 1040X.
- I filed a 2021 tax return and have some income from self-employment and I will provide a 2021 Tax Return Transcript from the IRS and copies of all Schedule K-1 (Form 1065) and W2's if applicable.
-If you do not have W2's, submit a signed statement confirming your wages with this form. If you earned more than \$400 in self-employment, you must file taxes.
- I am not required to, and will not file a 2021 tax return, but I did work and will provide copies of my 2021 W2's, and a Verification of Non-Filing Letter form the IRS dated on or after October 1, 2022.
- You may go to the IRS Website at www.irs.gov and click on "Get My Tax Record," then choose the transcript online or by mail. You may also fill out Form 4506-T and send that to the IRS to get a letter by mail. If you are unable to obtain one, please contact our office.
- I did not work in 2021 and will provide a "Verification or Non-Filing" from the IRS.
-If you did not work and did not file, we are required to get a Letter of Non-Filing from the IRS. Your financial aid file will be considered incomplete. You may go to the IRS Website at www.irs.gov and click on "Get My Tax Record," then choose the transcript online or by mail. You may also fill out Form 4506-T and send that to the IRS to get a letter by mail. If you are unable to obtain one, please contact our office.

Office of Financial Aid

2700 Evergreen Pkwy NW • Olympia, WA 98505 • phone 360-867-6205 • fax 360-867-6576 • web www.evergreen.edu/financialaid • email finaid@evergreen.edu