



2023-2024 Independent Student Verification Worksheet

What Is Verification?

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, the government may ask you to confirm the information you 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 may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit them to the Financial Aid Office. **Please provide the required information as quickly as possible because your aid cannot be finalized until verification has been completed. If you have any questions, please contact us at 410-626-2502 or annapolis.financialaid@sjc.edu for the Annapolis Campus or 505-984-6058 or santafe.financialaid@sjc.edu.**

What Are the Steps?

1. **If requested**, please include any other requested tax documents such as W-2 forms or tax transcripts. Please note that a tax return (often the 1040) is not a tax transcript. Tax transcripts may be requested here: <https://www.irs.gov/individuals/get-transcript>
2. Please write your name on tax return transcript.
3. Complete and sign this worksheet.
4. Review all information sent from the Financial Aid Office and the second page of this worksheet to see if you need to submit other documentation.

A. Student Information

_____	_____	_____	_____
Last Name	First Name	M.I.	Last 4 Digits of Social Security Number
_____		_____	_____
Address (Include Apt. #)		City	State Zip Code
_____	_____	_____	
Date of Birth	Email Address	Phone Number (Include Area Code)	

B. Independent Student's Family Information

List **all** the people expected to be in your household between July 1, 2023 and June 30, 2024. Include **yourself**, **your spouse** (if married), and **your children** and **your spouse's children** if you will provide more than half of their support from July 1, 2023 through June 30, 2024, even if they don't live with the you. Include **other people** only if they now live with you and receive, and will continue to receive, more than half of their support from you between July 1, 2023 and June 30, 2024.

List the college for any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024.

FULL NAME	AGE	RELATIONSHIP	COLLEGE
		Self	St. John's College

C. Student and Spouse's Income Information

Check the appropriate boxes below and provide the requested information and documents:

- I used the IRS Data Retrieval Tool (after my 2021 taxes were completed and processed by the IRS) to transfer my 2021 income information to the FAFSA and made no further changes to the information (Review Verification Worksheet Instructions for more in depth guidance in using the IRS Data Retrieval Tool).
- I did not (or could not) transfer my 2021 income information to the FAFSA using the IRS Data Retrieval Tool. I have attached a copy of my **2021 IRS Tax Return Transcript** (Review the Verification Worksheet Instructions for more in depth guidance in ordering a 2021 IRS Tax Return Transcript).
- I was not required to file a 2021 Federal Income Tax Return. I have **attached copies of all 2021 IRS W-2 forms** issued to the student. Please list below the names of all the student's employers (even if a W-2 is not available), the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. (Enter "No Job" under "Employer Name" if you did not work.) If additional space is needed, attach a separate page with the student's name at the top. All nontax filers are also required to **provide an IRS Verification of Non-Filing Letter (Form 4506-T)** dated on or after October 1, 2021, which can be requested at www.irs.gov. Additional information on how to obtain the IRS Verification of Non-Filing Letter can be found on the instructions page.

Employer's Name	2021 Amount Earned	IRS W-2 Attached?

D. Certification

The person signing this worksheet certifies that all of the information reported on it is complete and accurate. Warning: If you purposefully give false or misleading information on this form, you may be fined, sentenced to jail, or both.

Electronic signatures will not be accepted.

Student's Signature: _____

Date: _____

When all required documents have been gathered, please submit your information to the appropriate St. John's campus. Watch for two sided documents. Be sure to include both sides when emailing.

Annapolis Campus
Financial Aid Office
St. John's College
60 College Avenue
Annapolis, MD 21401
Fax: 410-269-7916

Secure forms upload page:
<https://www.sjc.edu/finaid/form>

Santa Fe Campus
Financial Aid Office
St. John's College
1160 Camino Cruz Blanca
Santa Fe, NM 87505-4599
Fax: 505-984-6164

Office Use Only:

Verification Completed By: _____

Date _____



St. John's College

2023–2024 Independent Student Verification Instructions

For about half of our students, the U.S Department of Education requires schools to verify the data reported on the Free Application for Federal Student Aid (FAFSA). Your file has been selected for verification; please follow the steps as outlined below.

1. You must complete the 2023-2024 Independent Verification Worksheet. **Remember to answer every question on the form; in addition the form must be SIGNED by the student.**
2. Both you and your spouse, if married, must provide official 2021 federal tax information. **If you and/or your spouse are not required to file a federal tax return per the IRS regulations, you will need to indicate this in Sections C on the 2023-2024 Independent Verification Worksheet and submit W-2 and 1099-Misc. forms for 2021.**
3. **Additionally, nontax filers are required to provide an IRS Verification of Non-Filing Letter dated on or after October 1, 2021.** The letter can be obtained by visiting www.irs.gov and typing in "Form 4506-T" in the search box. Once you have reached the form, fill out lines 1a through 5, check the box on line 7, type 12/31/2021 on line 9, then print and sign.
4. If you and/or your spouse are required to file a federal tax return, **you have two options (A and B listed below) in which to submit income information. Please make sure to indicate in Section C on the 2023-2024 Independent Verification Worksheet which option you will use.**

A. IRS Data Retrieval Tool

Most FAFSA filers have the option of securely transferring their 2021 income data directly from the Internal Revenue Service (IRS) database to their online 2023-2024 FAFSA. This option is available to individuals whose 2021 federal tax return has already been processed by the IRS. If you did not take advantage of this data transfer at the time you originally completed your FAFSA, you can still do so by going to www.fafsa.gov and updating your tax information reported on the FAFSA. You would need to select "Make FAFSA Corrections" and follow appropriate steps. Applicants will need to authenticate their identity before any personal information is displayed. Once authenticated, you will be prompted to "transfer" the tax information to the FAFSA. **(HIGHLY RECOMMENDED FORM OF SUBMISSION FOR FASTER PROCESSING).**

You **should not** use the IRS Data Retrieval Process if any of the following situations apply:

- You used an 888 identifier in place of a Social Security Number on the FAFSA;
- Your marital status date listed on the FAFSA is later than January 1, 2022;
- You have not yet filed or will not file a 2021 federal tax return;
- You have a tax filing status of "married filing separately" for 2021;
- **For those with unusual tax filing circumstances, please see the reverse side of this document for instructions or call 410.626.2502 (Annapolis) or 505.984.6058 (Santa Fe) for instructions regarding your specific situation**

B. IRS Tax Return Transcript

If you are required to file a 2021 federal tax return and did not use the IRS Data Retrieval Process, you must request a 2021 Tax Return Transcript from the IRS and upon receipt submit a copy to the Financial Aid Office. For students who had a filing status of "married filing separately, IRS Tax Return Transcripts must be submitted for both the student and their spouse.

PLEASE NOTE: IT MAY TAKE UP TO TWO WEEKS FOR THE IRS TO PROCESS YOUR REQUEST.

There are three methods to request a Tax Return Transcript:

1. Online via the IRS website at <https://www.irs.gov/individuals/get-transcript>
2. By calling 1-800-908-9946; or
3. Complete and submit FORM 4506-T to the IRS.
→Please write the student's name on the transcript.

5. **Please submit in a timely fashion all documents at the same time to the address below. Until all documents are received, the file cannot be reviewed.**

Annapolis Campus
Financial Aid Office
St. John's College
Fax 410-269-7916

Secure forms upload page:
<https://www.sjc.edu/finaid/forms>

Santa Fe Campus
Financial Aid Office
St. John's College
Fax 505-984-6164

6. **Please review the instructions to make sure you have completed and submitted all the required documents.** Failure to submit all the documents as per the instructions will delay processing your file.
7. **You must submit required documents before classes begin.** If you do not, your financial aid may be reduced or canceled and you will need to pay your account balance out of pocket.
8. **If verification results in changes to your award, we will email you an award notification to your St John's email address.**

Verification of 2021 Income Information for Individuals with Unusual Circumstances

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2021, provide both of the following:

- A signed copy of the original 2021 IRS income tax return that was filed with the IRS or a **2021 IRS Tax Return Transcript** for the 2021 tax year.
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

- A victim of IRS identity theft who is not able to obtain a **2021 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2021 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2021 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2021 income tax return(s).

Current Year Income Is Significantly Less Than 2021 Income

- Please contact the appropriate campus financial aid office for further instruction.