



## 2023-2024 Independent Student Verification Worksheet

Your FAFSA application was flagged by the U.S. Department of Education for a review process known as "Verification". As part of this process, we are required to verify the information you provided on the Free Application for Federal Student Aid (FAFSA) before disbursing financial assistance. Corrections to your FAFSA may be made by us once verification items are submitted and reviewed by our staff.

# Level #1

You are asked to provide the requested information within **three weeks** of our request (but no later than one month prior to your planned enrollment) to allow us time to provide you with complete and accurate information about your eligibility for financial assistance. Failure to provide this information will prevent us from disbursing financial assistance to you and may result in you not being allowed to enroll if you have not secured the funding necessary to cover your out-of-pocket costs. The sooner you provide us with this information, the longer we have to plan appropriately for your attendance at Monmouth College.

### A. Student Contact Information:

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ M.I.: \_\_\_\_\_ SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
Permanent Street Address: \_\_\_\_\_ Apt# \_\_\_\_\_ Birth date: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Preferred Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

### B. Spouse's (if you have one) Contact Information:

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ M.I.: \_\_\_\_\_ SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
Permanent Street Address: \_\_\_\_\_ Apt# \_\_\_\_\_ Birth date: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Preferred Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

### C. Household Information: List below the people in the student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2023, through June 30, 2024, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provide more than half of that person's support through June 30, 2024.

Full Legal Name	Relationship to you (Spouse/child)	Age	If Enrolled at <b>least half time</b> from July 2023 – June 2024 list name of College below	Year in college during 2023-2024 (Fr/So/Jr/Sr)
1.	<b>yourself</b>		<b>Monmouth College</b>	
2.				
3.				
4.				
5.				
6.				
7.				
8.				

If you have more than 8 members in your household, please attach an additional page outlining additional members of the household.

**D. Student Tax Transcripts and Income Information:**

If the student *has* filed an IRS 2021 Federal Tax Return, proceed to Box 1.

If the student *has not* filed an IRS 2021 Federal Tax Return, proceed to Box 2.

**Box 1 for Student Tax Filers**

**Important Note:** The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) which is part of the FAFSA on the Web at [FAFSA.gov](https://fafsa.gov). This allows you to transfer your tax information from the IRS directly to your FAFSA electronically.

- I have *already used* the IRS DRT in the FAFSA on the Web to transfer 2021 IRS income tax return information into my FAFSA on \_\_\_\_\_.
- I have *not yet used* the IRS DRT in the FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into my FAFSA by \_\_\_\_\_ (date).
- I was *unable or chose not to use* the IRS DRT in the FAFSA on the Web, and instead will provide the school with a **2021 IRS Tax Return Transcript from the Internal Revenue Service (IRS) online at [www.irs.gov](https://www.irs.gov) or by phoning the IRS (1-800-908-9946)**.
- I have provided a ***signed*** copy of my 2021 Federal Income Tax Return that was filed with the IRS, including all W-2's, schedules and forms.

**Box 2 for Student Non-Tax Filers**

**Whether you worked in 2021 or not, if you *did not* file a 2021 federal income tax return, you must provide a verification of non-filer from the IRS. You can obtain the verification of non-filer by going to [www.irs.gov](https://www.irs.gov), complete the IRS form 4506-T and submit it, or by phoning the IRS (1-800-908-9946). The verification of non-filer will be sent to you and you will then need to provide a copy with this verification form. This is a requirement of the Federal Department of Education.**

- I was not employed, had no income earned from work in 2021, and indicated this on the FAFSA.
- I was employed in 2021 and have listed below the names of all employers and the amount earned from each employer in 2021.  
**Provide copies of all 2021 IRS W-2 forms issued to you by your employers.**

If a W-2 is not available, or you did not save a copy of your IRS Form W-2, you should request a replacement W-2 from the employer who issued the original. A W-2 transcript from the IRS is also acceptable. If the you are unable to obtain one in a timely manner, you may provide a signed statement that includes the amount of income earned from work, the source of that income, and the reason why the W-2 is not available in a timely manner.

List every employer even if the employer did not issue an IRS W-2 form.

Employer Name	Was a W-2 provided?	Amount

**This is a requirement of the Federal Department of Education.**

E. Spouse's (if married) Tax Transcripts and Income Information: (check one)

If the spouse *has* filed an IRS 2021 Federal Tax Return, proceed to Box 1.  
If the spouse *has not* filed an IRS 2021 Federal Tax Return, proceed to Box 2.

**Box 1 for Spouse Tax Filer**

**Important Note:** The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) which is part of the FAFSA on the Web at [FAFSA.gov](https://fafsa.gov). This allows you to transfer your tax information from the IRS directly to your FAFSA electronically.

- My spouse used the IRS DRT in the FAFSA on the Web to transfer their 2021 IRS income tax return information into my FAFSA on \_\_\_\_\_.
- My spouse has *not yet* used the IRS DRT in the FAFSA on the Web, but will use the tool to transfer their 2021 IRS income tax return information into my FAFSA by \_\_\_\_\_ (date).
- My spouse was *unable or chose not to use* the IRS DRT in the FAFSA on the Web to transfer their 2021 IRS income tax information, and instead will provide the school with a **2021 IRS Tax Return Transcript from the Internal Revenue Service (IRS) online at [www.irs.gov](https://www.irs.gov) or by phoning the IRS (1-800-908-9946).**
- My spouse has provided a signed copy of their 2021 Federal Income Tax Return that was filed with the IRS, including all W-2's, schedules and forms.

**Box 2 for Spouse Non-Tax Filer**

Whether you worked in 2021 or not, if you *did not* file a 2021 federal income tax return, you must provide a verification of non-filer from the IRS. You can obtain the verification of non-filer by going to [www.irs.gov](https://www.irs.gov), complete the IRS form 4506-T and submit it, or by phoning the IRS (1-800-908-9946). The verification of non-filer will be sent to you and you will then need to provide a copy with this verification form. This is a requirement of the Federal Department of Education.

- My Spouse was not employed and had no income earned from work in 2021.
- My Spouse was employed in 2021 and has listed below the names of all employers and the amount earned from each employer in 2021. **Provide copies of all 2021 IRS W-2 forms issued to the spouse by their employers.**

If a W-2 is not available, or your spouse did not save a copy of the IRS Form W-2, your spouse should request a replacement W-2 from the employer who issued the original. A W-2 transcript from the IRS is also acceptable. If your spouse is unable to obtain one in a timely manner, he/she may provide a signed statement that includes the amount of income earned from work, the source of that income, and the reason why the W-2 is not available in a timely manner.

List every employer even if the employer did not issue an IRS W-2 form.

Employer Name	Was a W-2 provided?	Amount

This is a requirement of the Federal Department of Education.

F. Required Signatures:

Each person(s) signing below certify that all the information reported on this worksheet is complete and correct.

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

Complete, sign and return this worksheet. **Do not leave sections of this form blank.** Incomplete forms will be returned to you.  
Return Form by postal mail to: Monmouth College, Office of Student Financial Planning, 700 East Broadway, Monmouth, IL 61462  
Or you may FAX to: 309-457-2373 Or you may scan and email to: [finaid@monmouthcollege.edu](mailto:finaid@monmouthcollege.edu)  
Or you may scan and upload to the Self-Service portal at: <https://ss.monmouthcollege.edu/student/>