

## 2023-24 Independent Verification Worksheet – V1

The Department of Education selected your 2023-24 Free Application for Federal Student Aid (FAFSA) for a review process called Verification.

We cannot continue processing or reviewing your application for federal or state aid until all requested items have been submitted.

Please complete this worksheet in full with a student signature and submit it with any requested supporting documents to the BCU Financial Aid Office at the above address. If there are differences between your FAFSA application information and these verification documents BCU will make the necessary corrections to your FAFSA information.

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_

Student Home Street Address: \_\_\_\_\_

Student Home City/State/Zip: \_\_\_\_\_

Student E-Mail Address: \_\_\_\_\_ Phone #: \_\_\_\_\_

### Student's Family Information:

List below the people in your household. **Include all of the following:**

- Yourself (the student)
- Your spouse (if married)
- Your or your spouse's children, if you and/or your spouse will provide more than half of their financial support from July 1, 2023 through June 30, 2024, even if the child does not live with you
- Other people if they now live with you and you and/or your spouse provide more than half of their financial support and will continue to provide more than half of their financial support through June 30, 2024
- *If more space is needed, attach a separate page with your name and SSN at the top.*

Full Name	Age	Relationship	College
		<i>Self</i>	<i>BCU</i>

**In the 'College' column above:** Include the name of the college for all listed household members who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023 and June 30, 2024.

Student Name \_\_\_\_\_

Student ID: \_\_\_\_\_

- If you were married at the time of signing the FAFSA, you need to provide the following information for both you and your spouse.

Student: Did you file a US 2021 Federal Income Tax Return?

Yes-Complete Box A

No-Complete Box B (and C if required)

**Box A:**

<input type="checkbox"/>	I/We successfully linked the IRS information onto my FAFSA (IRS Data Retrieval)
<input type="checkbox"/>	I/We successfully made a correction to my FAFSA and linked the IRS information (IRS Data Retrieval)
<input type="checkbox"/>	I/We am unable or chose not to link IRS information onto my FAFSA. Instead I am providing a <b>signed</b> copy of my Federal 2021 Tax Return and applicable schedules (If you did not keep a copy of your tax return-see page 3 for instructions to obtain the IRS 2021 Tax Return Transcript)

**Box B:**

<input type="checkbox"/>	I/We was/were not employed in 2021 and had no income from work.
<input type="checkbox"/>	I/We was/were employed in 2021, but income was less than the tax filing requirement. (See page 3 for IRS 2021 Tax Return Filing Requirements) <b>Complete Box C.</b>

**Box C:**

You will need to provide BCU with:		
	* IRS Verification of Non-Tax filing letter	
	* Complete Information below	
	* Provide copies of your W-2s	
<b>Student and Spouse Non-Tax Filer Information:</b> List below all income sources and amounts earned from working during 2021. Also state Yes or No whether a W-2 was received and provide a copy of the W-2.		
Income Source	2020 Amount Earned	2020 W-2 Provided

**Student Physically Sign this Worksheet (Electronic or typed signatures cannot be accepted)**

By signing this form, you certify that all information reported on it is complete and correct. *Warning: If you purposely give false or misleading information on this worksheet, you may be fined up to \$20,000, sent to prison, or both.*

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

If you have questions regarding this process, please call the Financial Aid Office at 800-662-3303 or e-mail [financial.aid@briarcliff.edu](mailto:financial.aid@briarcliff.edu).

Submit completed worksheet and documentation in one of the following ways:

Fax: 712-279-5410

Scan and e-mail: [financial.aid@briarcliff.edu](mailto:financial.aid@briarcliff.edu)

Physically mail to or drop off at:

Briar Cliff University  
Financial Aid Office  
3303 Rebecca Street  
Sioux City, Iowa 51104

#### **Amended Tax Return Filers:**

- If you used the IRS Data Retrieval Tool, we would need a copy of your signed 2021 1040X form
- If you did not use the IRS Data Retrieval Tool, we will need both:
  - A copy of your 2021 signed 1040X form
  - IRS 2021 Tax Return Transcript or signed copy of Federal 2021 Tax Return and applicable schedules

#### **Option to obtain the IRS 2021 Tax Return Transcript or Verification of Non-Filing letter**

- Go to your local Federal IRS tax office to request it in person.
- Get Transcript Online: Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.