



23-24 Verification Worksheet (V5)

Your FAFSA was selected by the U.S. Dept. of Education for review in a process called **“verification”**. In this process, we are required by Federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with an IRS Tax Return Transcript of your 2021 Federal tax filing (and your spouse’s if you are married, or parents’ if you are considered dependent for Federal aid purposes). If there are differences between your FAFSA and the documents submitted, corrections will be made by our office.

What you should do:

1. Collect your (and your spouse’s or parents’) financial documents (Tax Return Transcripts, 1040’s, and/or W-2’s)
2. **Complete all of the sections and sign the worksheet.** You (and a parent if you are required to provide parent income information) must complete all sections.
3. Contact the Office of Financial Aid with questions.

Student Information

Student’s Name: _____ Student ID#: _____

Student’s Date of Birth: _____ Student’s Phone #: _____ Student’s Last 4# of SSN: _____

Student’s Email Address: _____

A. Family Information

INDEPENDENT STUDENTS: List the people that you (and your spouse) will support between July 1, 2023 and June 30, 2024. Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2023 – June 30, 2024. Exclude children/siblings whom are wards of the state, i.e. foster care. **DEPENDENT STUDENTS:** List all the people in your household between July 1, 2023 and June 30, 2024. Include yourself, your parent(s)/step-parents, and your parents’ other children if (a) your parents provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. Include other people only if they now live with your parents and receive, and will continue to receive, more than half their support from them between July 1, 2023 and June 30, 2024. Exclude children/siblings whom are wards of the state, i.e. foster care. **INDEPENDENT AND DEPENDENT:** Write the name of the college for any family member who will be attending college at least half-time between July 1, 2023 and June 30, 2024 and will be enrolled in a degree, diploma, or certificate program.

Example Household Members	Relationship	Full Name	Age	Will they attend college at least half-time?	If yes, list College Name
MCK Student	SELF			Not Applicable	McKendree University
Father/Mother /Stepfather				Not Applicable	
Students Spouse				<input type="checkbox"/> Yes* <input type="checkbox"/> No	
All other siblings, children or dependents that fit criteria described above.				<input type="checkbox"/> Yes* <input type="checkbox"/> No	
				<input type="checkbox"/> Yes* <input type="checkbox"/> No	
				<input type="checkbox"/> Yes* <input type="checkbox"/> No	
				<input type="checkbox"/> Yes* <input type="checkbox"/> No	

If more space is needed, provide a separate page with the student’s name and ID number at the top.

*Only check “Yes” if they will be seeking a degree or certificate & attending at least half-time between 7/1/2023 and 6/30/2024

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

B. Student Tax and Income Information

Did you (the student) file a 2021 Federal Tax Return? Please check only **ONE** box below:

- Yes, I used the IRS Data Retrieval Tool to import my 2021 income information into the FAFSA.
- Yes, but I was unable or chose not to use the IRS Data Retrieval Tool. I am **attaching** a 2021 IRS Tax Return Transcript that I requested at <https://www.irs.gov/individuals/get-transcript> or I am **attaching** a signed copy of my 2021 Federal Tax Return.
- No, I was not employed and had no income earned from work in 2021.
- No, I will not file and am not required to file a 2021 IRS Federal Tax Return. I did earn income from work in 2021 as listed below.
- **Complete the chart below:** list employer(s) and the amount that was earned in 2021
 - **Attach copies** of all 2021 W-2 and 1099 forms for each employer/source listed below

Student's Source of Income/Support	2021 Amount Earned

C. Parents Tax and Income Information

****Dependent students only, using Parent Information of those listed on the 2022-2023 FAFSA**

Did your parent(s) file a 2021 U.S. Federal Tax Return? Please check only **ONE** box below:

- Yes, the student's parent(s) used the IRS Data Retrieval Tool to import their 2021 income information into the FAFSA.
- Yes, but the student's parent(s) were unable or chose not to use the IRS Data Retrieval Tool. I am **attaching** a 2021 IRS Tax Return Transcript that I requested at <https://www.irs.gov/individuals/get-transcript> or I am **attaching** a signed copy of my 2021 Federal Tax Return. *NOTE: If married and filing separate returns or if biological parents live together and are not married, a signed tax return is required for both parents.*
- No, Parent(s) was not employed and had no income earned from work in 2021. I am **attaching** a Verification of Non-Filing Letter for each of my parent(s) listed on the FAFSA. (IRS Verification of Non-Filing can be completed at <https://www.irs.gov/forms-pubs/about-form-4506-t>)
- No, Parent(s) will not file and are not required to file a 2021 IRS Federal Tax Return. They did earn income from work in 2021 as listed below.
- **Complete the chart below:** list employer(s) and the amount that was earned in 2021
 - **Attach copies** of all 2021 W-2 and 1099 forms for each employer/source listed below.
 - **Submit** a 2021 IRS Verification of Non-filing Letter. Each parent in the household who did not file must submit one.

Parent(s)'s Source of Income/Support	2021 Amount Earned

D. Untaxed Income (Student and Parents)

Did you or your parent(s) receive any Untaxed Income during 2021?

No

Yes

If yes, please provide source (such as Untaxed Pensions, IRA Deductions and Payments, Tax Exempt Interest, and Untaxed IRA Distributions) and list annual amount below: If nothing is checked we will assume "No".

Source of Untaxed Income	Student Untaxed Income Annual Amount	Spouse or Parent Untaxed Income Annual Amount

E. Identity and Statement of Educational Purpose

Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at **McKendree University** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
(Print Student's Name)

Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **McKendree University** for 2023-2024.

(Student's Signature)

(Date)

(Student's ID Number)

(School Official's Signature Present at Signing)

(Date)

If this form cannot be signed before a McKendree University representative, please complete the following form in front of a Notary.

ONLY COMPLETE THIS PAGE IF YOU CANNOT APPEAR IN PERSON TO COMPLETE SECTION C.**Identity and Statement of Education Purpose
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at **McKendree University** to verify his or her identity, the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
(Print Student's Name)

Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **McKendree University** for 2023-2024.

(Student's Signature)

(Date)

(Student's ID Number)

If this form was not signed in the Office of Financial Aid you must sign in the presence of a Notary and have the following Notary's Certification completed:

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____
(Date) (Notary's Name)

personally appeared, _____, and proved to me on basis of
(Printed name of signer)

satisfactory evidence of identification _____ to be the above-
(Type of unexpired government-issued photo ID provided)
named person who signed the foregoing instrument.

WITNESS my hand and official seal _____
(seal) (Notary Signature)

My commission expires on _____
(Date)

Print Student's Name

F. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent (if the student is a dependent student) whose information was reported on the FAFSA must sign and date below.

**Signing for someone else is fraud, even with their permission.
ELECTRONIC SIGNATURES ARE NOT ACCEPTED.**

Student's Signature: _____

Student's Name (Print): _____ Date: _____

Parent's Signature: _____
(REQUIRED FOR DEPENDENT STUDENTS ONLY)

Parent's Name (Print): _____ Date: _____

**Federal Warning: If you purposely give false or misleading
information you may be fined, sentenced to jail, or both.**

Submit this form and all other required documents to the Office of Financial Aid at McKendree University:

Mail to:
Office of Financial Aid
701 College Road
Lebanon, Illinois 62254

Or by Fax to:
618-537-6960

Or in person:
Lebanon Campus, Wildy
Hall, 1st Floor