



# 2024-2025 Verification Worksheet

## for Dependent Students

### Federal Student Aid Programs

Your FAFSA was selected for a process called verification. If consent and approval to transfer FTI (Federal Tax Information) from the IRS to the FAFSA via the FA-DDX wasn't provided while filling out the FAFSA, we are required by federal law to compare your application with information on this form and with your and your parent's 2022 federal tax information.

If any items have to be corrected, the Truman State University Financial Aid Office will send changes to the FAFSA Processing System electronically. You will receive a new FAFSA Submission Summary.

**What you should do:**

- **Submit all documents as soon as you can - by June 1** if you expect aid to be ready when classes begin, **Aug. 19, 2024** to the Truman State University Financial Aid Office.
- Pay deposits and pre-enroll when scheduled, because verifications for enrolled students are completed first.
- Respond promptly to requests for additional information.

**Federal aid offers cannot be paid until verification is complete.** The final deadline is April 1, 2025, or prior to withdraw from school. (For Pell Grant only, the deadline will be given in the Federal Register or will be within 120 days after the last day of enrollment, whichever is earlier.)

### A. Student Information

Last Name	First Name	M.I.	Date of Birth	Student Banner ID #
Student Phone Number		Parent Phone Number		
Student Email Address		Email Address for Parent ( <i>whose information is provided on FAFSA</i> )		

\*\*\*By providing an email address below, you are authorizing the Truman State University Financial Aid Office to communicate through email if any additional information is required for verification. Please DO NOT provide email addresses if you do not check your email account regularly.\*\*\*

### B. Parent Marital Status

What was your **parent's** marital status on the date you completed the FAFSA? *\*\*Additional instructions on page 3\*\**  
*If your parent's marital status is different today from the date you filed the FAFSA, attach a statement indicating the change and date of change.*

- |  |   |                                    |
|--|---|------------------------------------|
| <input type="checkbox"/> Single (never married)  | <input type="checkbox"/> Unmarried and both legal parents living together | <input type="checkbox"/> Remarried |
| <input type="checkbox"/> Married (not separated) | <input type="checkbox"/> Separated  | <input type="checkbox"/> Divorced  |
|  |   | <input type="checkbox"/> Widowed   |

### C. Student Income Information to Be Verified (Check the box that applies.)

**Have you or will you file a 2022 U.S. Federal Tax Return?**

- YES:** The student provided consent and approval to transfer FTI (Federal Tax Information) from the IRS to the FAFSA via the FA-DDX **OR** will provide Truman with a 2022 IRS Tax Return Transcript or a signed copy of the 2022 income tax return and Schedules 1, 2 & 3. *\*Instructions for requesting a Tax Return Transcript on page 3\**
- NO:** Complete the *Non-Tax Filers Only* section below if the student **did not/will not file and is not required to file** a 2022 Federal IRS Tax Return.

**Non-Tax Filers Only - Check the one box that applies:**

- The student was not employed and had no income earned from work in 2022.
- The student was employed in 2022. Complete the table below and submit all W-2 and 1099 forms documenting student income.

This section for non-tax filers only

Source of Income/ Employer Name	2022 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Victims of Identity Theft:** If you the student were a victim of an IRS identity theft for the 2022 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 3 for additional instructions.

- Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2022 tax year. The IRS has been made aware of this tax-related identity theft.

**D. Parent Income Information to Be Verified (Check the box that applies)**

Complete the section below for the parent(s) who are listed on the FAFSA. If two parents were listed, provide information below for both.

**Have you or will you file a 2022 U.S. Federal Tax Return?**

**YES:** The student's parent(s) provided consent and approval to transfer FTI (Federal Tax Information) from the IRS to the FAFSA via the FA-DDX **OR** will provide the institution with a 2022 Tax Return Transcript or a signed copy of the 2022 income tax return with Schedules 1, 2 & 3. *\*Instructions for requesting a Tax Return Transcript on page 3\**

**NO:** Complete the *Non-Tax Filers Only* section below if the parent **did not/will not file and is not required to file** a 2022 Federal IRS Tax Return.

**Non-Tax Filers Only - Check the one box that applies:**

The parent was not employed and had no income earned from work in 2022. *\*Additional information may be requested.\**

The parent was employed in 2022. Complete the table below and submit all W-2 and 1099 forms documenting parent income.

Source of Income/ Employer Name	2022 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No

This section for non-tax filers only

**Victims of Identity Theft:** If you the parent were a victim of an IRS identity theft for the 2022 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 3 for additional instructions.

Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2022 tax year. The IRS has been made aware of this tax-related identity theft.

**E. Certifications and Signatures**

Each person signing the worksheet certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

**WARNING:** *If you purposely give false or misleading information, you may be fined, be sentenced to prison, or both.*

\_\_\_\_\_ Date \_\_\_\_\_  
Student's Handwritten *Legal Signature (Required)*

\_\_\_\_\_ Date \_\_\_\_\_  
Parent's Handwritten *Legal Signature (Required)*

**Verification Checklist**

**Before submitting this worksheet, double check that you have done the following:**

- Attached Student/Parent IRS Tax Return Transcripts if consent and approval wasn't provided to transfer FTI (Federal Tax Information) from the IRS via the FA-DDX while filling out the FAFSA (*see page 3*)
- Completed the Student/Parent Non-Tax Filer Charts in Section C and D for non-tax filers and attached all supporting income documentation
- Student Signed/Dated Worksheet
- Parent Signed/Dated Worksheet

**FAILURE TO READ AND COMPLETE ALL SECTIONS OF THIS WORKSHEET WILL RESULT IN DELAYS TO YOUR VERIFICATION PROCESS AND MAY DELAY DISBURSEMENT OF FINANCIAL AID**



Please do not submit W-2 forms for 2022 tax filers unless they are requested from our office.

**Non-tax filers are still required to submit all W-2 forms.**

**RETURN THIS WORKSHEET BY MAIL, EMAIL, OR FAX TO:**

Truman State University  
Financial Aid Office MC 103  
100 E. Normal, Kirksville MO 63501  
Email: [finaid@truman.edu](mailto:finaid@truman.edu)

**(be sure to mark out all but the last four digits of any SSNs if you choose the email option)**

Fax: 660-785-7389

### Parental Information for Dependent Students

- If your parents are divorced or separated, the parent who provides the greater portion of the student's financial support should be included on the FAFSA and the Verification Worksheet.
- If this parent is remarried as of the date you completed the FAFSA, you should also provide information for your stepparent.
- If your legal parents (biological and/or adoptive) are not married to each other and live together, you should provide information for both of them regardless of their gender.

### Requesting A Tax Transcript

- **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 (normally this will be the address used with the 2022 tax return was filed), (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.
- **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.
- **Automated Telephone Request**—1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

### General Information to Obtain A Transcript

- When did you submit your 2022 return? It can take up to 8-12 weeks after filing your return before transcript information is available.
- Have the transcript sent to you and then you submit a copy to our office and keep a copy for your own records.
- Be sure to submit all pages of the transcript.

### FTI Consent and Approval

- For individuals who provided consent and approval to transfer FTI from the IRS to the FAFSA via the FA-DDX, the Financial Aid Office will use this information instead of a tax transcript.
- **\*\*\*\*Please note, in some instances, a tax transcript may still be needed.\*\*\*\***

### Victims of Identity Theft

IRS Tax Return Transcripts are not available for victims of identity theft. An individual who is a victim of identity theft and cannot get a return transcript must contact the IRS's Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. After the IPSU authenticates the tax filer's identity, they can request an alternate transcript called a **Transcript Database View (TRDBV)**. Please indicate on this worksheet that you are a victim of Identity Theft and submit the TRDBV in place of a tax return transcript.

## **RETURN THIS WORKSHEET BY MAIL, EMAIL, FAX TO:**

Truman State University  
Financial Aid Office MC 103  
100 E. Normal, Kirksville MO 63501

Email: [finaid@truman.edu](mailto:finaid@truman.edu)  
(be sure to mark out all but the last four digits of any SSNs if you choose the email option)

Fax: 660-785-7389

### **Truman Document Upload (Students Only)**

- Students can access via TruView—type ‘Truman Document Upload’ in search bar, click on ‘Truman Document Upload’
- Can upload one document at a time, documents can be combined into one (i.e. income tax return and W-2’s)
- Select document type—options include
  - ◇ Financial Aid Forms
  - ◇ Other
  - ◇ Special Condition Documents
  - ◇ Verification Documents (**Choose this option to return this worksheet**)
- Click ‘Choose File’ and locate document to upload
- Click ‘Upload File’

*Incoming Freshman:* The Truman Document Upload is available to you once you’ve enrolled in classes at summer orientation.