

## 2022-2023 Independent Custom/Aggregate Verification Worksheet

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for verification, a process in which the Office of Financial Aid must obtain documentation to ensure the accuracy of the information submitted on your FAFSA. The information provided on your FAFSA will be compared with the information on the required documents you submit. If there are differences between the FAFSA and the documents, your FAFSA information may be updated. Please contact the Office of Financial Aid as soon as possible if you have any questions regarding verification so your financial aid is not delayed.

### Section A: Student's Information – To be completed by the student

Student Last Name	First Name	Middle Initial	Student ID
Street Address	City	State	Zip
			Home/Cell Phone Number

### Section B: Number of Household Members

Number of Household Members: 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, 2022, through June 30, 2023, even if a child does not live with the parents.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2023.

Number in College: Include in the space below information about any household member who is, or 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, 2022, and June 30, 2023, and include the name of the college.

Full Name	Age	Relationship to Student	College (if applicable)	Enrolled at least half-time? (Yes/No)
		Self	Notre Dame De Namur University	

*Note: The Office of Financial Aid may require additional documentation if there is reason to believe the information regarding the household members supported by the student/spouse and/or household members enrolled at eligible postsecondary educational institutions is inaccurate.*

**Section C: Income Information** – The options below apply to the student and spouse, if the student is married.  
Please notify the Office of Financial Aid if the student or spouse filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

Read all options below and check the ONE box in this column that applies

- I, the student, have used the IRS DRT in FAFSA on the web to transfer 2020 IRS income tax return information into the FAFSA.
- I, the student, have not yet used the IRS DRT in FAFSA on the web, but will use the tool to transfer 2020 IRS income tax return information into the FAFSA.
- I, the student, am unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school with a 2020 IRS Tax Return Transcript or a signed copy of the 2020 income tax return and applicable schedules.

*(Note - If the student and spouse filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the 2020 IRS Tax Return Transcript(s) must be provided for each.)*

- I, the student, have an unusual circumstance surrounding my tax filing. Please see the section on page 5 for more information on what documents to submit.

- Neither the student or spouse was employed and neither had income from work in 2020.
- The student and/or spouse will not file and are not required to file a 2020 income tax return with the IRS. The student and/or spouse were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. **The student and/or spouse will also provide documentation from the IRS dated on or after 10/1/2021 that indicates a 2020 IRS income tax return was not filed with the IRS, or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS and was unable to obtain the required documentation.**

Employer's Name	2020 Amount Earned	IRS W-2 Provided (Yes/No)
Total Amount of Income:	\$	

## Section D. Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The Office of Financial Aid at Notre Dame De Namur University will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official authorized to collect the student's ID. In addition, the student must sign, **in the presence of the institutional official**, the following:

### Statement of Educational Purpose

I certify that I \_\_\_\_\_ (Print Student's Name) am the individual signing this statement of Educational 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 Notre Dame De Namur University for 2022-2023.

\_\_\_\_\_  
Student's ID number

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

\_\_\_\_\_  
Date

The valid government issued documentation below was presented in person and reviewed by the Financial Aid staff member:

- Driver's License
- United States Passport
- State Issued Identification Card

**A photocopy of the Identification must be attached to this form upon submission.**

I certify that the copy above is true and accurate representation of the student's government issued identification.

\_\_\_\_\_  
Office of Financial Aid Staff Name

\_\_\_\_\_  
Office of Financial Aid Staff Signature

\_\_\_\_\_  
Date

---

## Identity and Statement of Educational Purpose (To Be Signed in the Presence of a Notary)

If the student is unable to appear in person at The Office of Financial Aid at Notre Dame De Namur University to verify his or her identity, the student must provide the following:

- A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement.
- The original notarized Statement of Educational Purpose (statement completed above and notarized below).

### Notary's Certificate of Acknowledgement

State of \_\_\_\_\_ city/county of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_ personally appeared,  
(Date) (Notary's Name)

\_\_\_\_\_, and provided to me on basis of satisfactory evidence of  
(Printed Name of Signer)

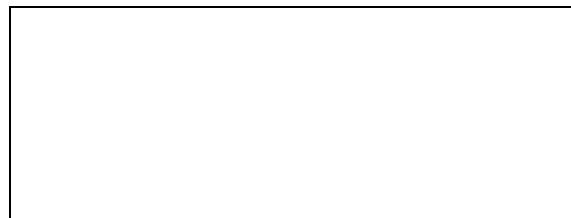
identification \_\_\_\_\_ to be the above-named person who signed the  
(Type of government-issued photo ID provided)  
foregoing instrument.

*Witness my hand and official seal*

\_\_\_\_\_  
(Notary Signature)

My commission expires on \_\_\_\_\_

Notary Seal



## Section E: Certification and Signature

The following signature(s) certify that all of the information reported on this worksheet is complete and correct.

\_\_\_\_\_  
Student's Signature (required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (optional)

\_\_\_\_\_  
Date

## Unusual Circumstances

If you indicated in Section C of this worksheet that there is an Unusual Circumstance surrounding your tax filing, please use the information below to determine the documents you must submit to the Office of Financial Aid, in addition to this worksheet, to complete the verification process.

### Extension

- Individuals granted only the automatic six-month extension must use the IRS DRT in FAFSA on the web or submit an IRS Tax Return Transcript to the Office of Financial Aid after the return has been filed.
- Individuals granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2020 must provide –
  - A copy of 2020 IRS's approval of an extension beyond the automatic six-month extension for tax year 2020;
  - Verification of Non-filing (VNF) Letter from the IRS dated on or after October 1, 2021 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
  - A copy of IRS Form W-2 for each source of 2020 employment income received or an equivalent document for tax year 2020 and,
  - If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and U.S. income tax paid for tax year 2020.

### Amended Return

An individual who amended an IRS Income Tax Return for tax year 2020 needs to provide the following documents:

- A signed copy of the 2020 IRS Form 1040X, in addition to one of the following:
  - IRS DRT information on FAFSA with all tax information from the original tax return; OR
  - A 2020 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other 2020 IRS tax transcript(s) that include all of the income and tax information required to be verified; OR
  - A signed copy of the 2020 IRS Form 1040 and the applicable schedules that were filed with the IRS.

### Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2020 income tax return and applicable schedules the individual filed with the IRS; *and*
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

### Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.