



2023–2024 Income Verification Worksheet for Federal Student Aid Programs (VW1/VW5)

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Federal guidelines state that information you reported on your FAFSA must be confirmed before any student aid is awarded. To verify that you provided correct information, we will compare your FAFSA with the information on this worksheet and with any other required documents. Complete this worksheet, attach any required documents, and submit the form to Teachers College Office of Financial Aid.

PART I: Student Information

Last Name, First Name, M.I.

TCID Number

Telephone Number (include area code)

PART II: Household Information

Please list the people in your household in the fields below, and be sure to include 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, 2023 and June 30, 2024, and include the name of the college. The people in your 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 student’s 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, 2024.

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half Time? (Yes or No) |
|------------------------------|-----------|---------------|---------------------------|--|
| <i>Marty Jones (example)</i> | <i>28</i> | <i>Spouse</i> | <i>Central University</i> | <i>Yes</i> |
| | | <i>Self</i> | | |
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Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institution is inaccurate.

PART III: Verification of 2021 Income Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the student and spouse **filed or will file** a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules**.

_____ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.

_____ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

***Note: The instructions below will outline the various ways you may request a 2021 IRS Tax Return Transcript.**

- **Get Transcript by Mail** – Go to 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.
- **Get Transcript Online** – Go to 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.
- **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.

AMENDED Tax Return Filers: If you (or your spouse, if married) file, or will file, an amended 2021 IRS tax return, you must provide a **2021 IRS Tax Return Transcript and** a signed copy of the **2021 IRS Form 1040X**, "Amended U.S. Individual Income Tax Return".

FOR CHANGES IN TAX FILING/MARITAL STATUS: If you and your spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules must be provided for each.

FOR VICTIMS OF IRS TAX-RELATED IDENTITY THEFT: If you (and/or your spouse, if married) were the victim(s) of IRS tax-related identity theft, you must provide a 2021 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 2021 income tax return and applicable schedules the individual filed with the IRS; **and** a statement signed and dated by the tax filer indicating that they were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

TEACHERS COLLEGE COLUMBIA UNIVERSITY

TCID: _____

PART III: Verification of 2021 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse **will not file and are not required to file** a 2021 income tax return with the IRS.

Check the box that applies.

- The student and spouse were not employed and had no income earned from work in 2021.
- The student and/or spouse were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. **Attach copies of all 2021 W-2 forms issued to the student and spouse by their employers.** List every employer even if the employer did not issue an IRS W-2 form.

If additional space is required, attach a separate page with your name and TC ID at the top.

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2021 |
|--|---|------------------------------|
| <i>ABC's Auto Body Shop (example)</i> | <i>Yes</i> | <i>\$2,000</i> |
| | | |
| | | |
| <i>Total Amount of Income Earned from Work</i> | | |

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of nonfiling from the IRS or other relevant tax authority and was unable to obtain the required documentation.

___ Check here if confirmation of nonfiling or a signed statement is provided.

___ Check here if confirmation of nonfiling or a signed statement will be provided later.

PART IV: Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional. *Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to Teachers College Office of Financial Aid and retain a copy for your record.*

Student's Name (Print)

Student's Signature

Date

WARNING: If you purposely provide false or misleading information, you may be fined, sent to prison, or both.

Spouse's Signature (Optional)

Date (Optional)

WE WILL ONLY ACCEPT PHYSICAL SIGNATURES OR ADOBE DOCUSIGN SIGNATURES.