



# 2023–2024 Academic Year Verification Worksheet (Independent) BYU–Hawaii Financial Aid & Scholarships

Independent

## Section A: Student's Information

Student's Last Name	First Name	MI	Student's BYUH ID #
Spouse's Last Name (if applicable)	First Name	MI	Spouse's BYUH ID # (if applicable)

## Section B: Number of Household Members and Number in College

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, 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 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.

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, 2023, and June 30, 2024, and include the name of the college. If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		Self		

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.

## Section C: Student Verification of 2021 Income

- If student is an **IRS Tax Filers**, complete section **C1**.
- If student is an **IRS Non-Tax Filers**, complete section **C2**.
- If student is a **Foreign Tax Filers**, complete section **C3**.
- If student is a **Foreign Non-Tax Filers**, complete section **C4**.
- If student served **Church Mission in 2021**, complete section **C5**.
- If student is unmarried, skip section **D**.

## **Section C1: IRS Tax Filers**

Instructions: Complete this section if the student 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 studentaid.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.

If the student filed a joint 2021 IRS income tax return, 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).

A **2021 IRS Tax Return Transcript** may be obtained through:

- **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.
- **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.
- **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.

If the student filed a separate 2021 IRS income tax returns, the IRS DRT cannot be used, **the 2021 IRS Tax Return Transcript(s)** must be provided for each.

- ☐ Check here if a 2021 IRS Tax Return Transcript(s) for the student is provided.
- ☐ Check here if a 2021 IRS Tax Return Transcript(s) for the student will be provided later.

## **Section C.2: IRS Nontax Filers**

Complete this section if the student will not file and is not required to file a 2021 income tax return with the IRS. Check the box that applies:

- ☐ The student was not employed and had no income earned from work in 2021.
- ☐ The student was 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. [Provide copies of all 2021 IRS

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

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021
(Example) ABC's Auto Body Shop	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after January 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

- ☐ Check here if a Verification of non-filing letter (for the student) is provided.
- ☐ Check here if a Verification of non-filing letter (for the student) will be provided later.

### **Section C.3: Foreign Tax Filers**

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 there are discrepancies to 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. Check the box that applies:

- ☐ Signed Non-IRS Income Tax Return is provided.
- ☐ Signed Non-IRS Income Tax Return will be provided later.

### **Section C.4: Foreign Non-Tax Filers**

Complete this section if the student will not file and are not required to file a Foreign 2021 income tax return. A signed statement of financial support must also be provided before verification can be completed. Check the box that applies:

- ☐ Student was not employed and had no income earned from work in 2021.
- ☐ Student was employed in 2021 and has listed below sources of income with the amount earned from each source.

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

### **Section C5: Church Mission (If Applicable)**

Complete this section if the student served a full-time Church mission in 2021.

Student served during the months of \_\_\_\_\_ to \_\_\_\_\_, in the year 2021. The financial support paid towards the student's Church mission by family, friends, ward members, or donors was \$ \_\_\_\_\_ per month.

## **Section D: Spouse Verification of 2021 Income**

- If spouse is an **IRS Tax Filers**, complete section **D1**.
- If spouse is an **IRS Non-Tax Filers**, complete section **D2**.
- If spouse is a **Foreign Tax Filers**, complete section **D3**.
- If spouse is a **Foreign Non-Tax Filers**, complete section **D4**.
- If spouse served **Church Mission** during 2021, complete section **D5**.

### **Section D1: IRS Tax Filers**

Instructions: Complete this section if the 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. In most cases, no further documentation is needed to verify 2021 income information that was transferred into the spouse's FAFSA using the IRS DRT if that information was not changed.

If the spouse filed a joint 2021 IRS income tax return, check the box that applies:

- ☐ The spouse has used the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- ☐ The spouse 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 spouse's FAFSA.
- ☐ The spouse 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).

A **2021 IRS Tax Return Transcript** may be obtained through:

- 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.
- 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.
- 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.

If the spouse filed a separate 2021 IRS income tax returns, the IRS DRT cannot be used, **the 2021 IRS Tax Return Transcript(s)** must be provided for each.

- ☐ Check here if a 2021 IRS Tax Return Transcript(s) for the spouse is provided.
- ☐ Check here if a 2021 IRS Tax Return Transcript(s) for the spouse will be provided later.

### **Section D2: IRS Nontax Filers**

Complete this section if the spouse will not file and are not required to file a 2021 income tax return with the IRS. Check the box that applies:

- ☐ The spouse was not employed and had no income earned from work in 2021.
- ☐ The spouse was 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. [Provide copies of all 2021 IRS W-2 forms issued to the spouse and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021
(Example) ABC's Auto Body Shop	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after January 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

- ☐ Check here if a Verification of non-filing letter (for the spouse) is provided.
- ☐ Check here if a Verification of non-filing letter (for the spouse) will be provided later.

### **Section D3: Foreign Tax Filers**

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 there are discrepancies to 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. Check the box that applies:

- ☐ Signed Non-IRS Income Tax Return is provided.
- ☐ Signed Non-IRS Income Tax Return will be provided later.

### **Section D4: Foreign Non-Tax Filers**

Complete this section if the spouse will not file and are not required to file a Foreign 2021 income tax return. A signed statement of financial support must also be provided before verification can be completed. Check the box that applies:

- ☐ Spouse was not employed and had no income earned from work in 2021.
- ☐ Spouse was employed in 2021 and has listed below sources of income with the amount earned from each source.

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

**Section D5: Church Mission (If Applicable)**

Complete this section if the spouse served a full-time Church mission in 2021.

Spouse served during the months of \_\_\_\_\_ to \_\_\_\_\_, in the year 2021. The financial support paid towards the spouse's Church mission by family, friends, ward members, or donors was \$ \_\_\_\_\_ per month.

**Section E: Certification and Signature**

Each person signing below certifies that all of the information reported is complete and correct.

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

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date