



**Santa Clara University Financial Aid Office  
2023-2024 Standard Verification Worksheet - Independent**

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The U.S. Department of Education regulations state that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA.

To verify that you provided correct information, the Financial Aid Office at Santa Clara University will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected by the Financial Aid Office.

- **You must complete and sign this worksheet, attach any required documents, and submit them to the Financial Aid Office.**
- **Please be sure to include your student’s name and SCU ID number on any attached documents and on any additional documents that may be sent later.**
- **Please submit documents in PDF format only. Photo attachments are not acceptable.**

After review, Santa Clara University may ask for additional information. If you have questions about verification, contact our office as soon as possible so that your financial aid will not be delayed.

**A. Independent Student’s Information**

Print Full Name (as it appears on your campus student records)	Campus/Student Identification Number
Print Full Mailing Address (Number, Street, City, State, Zip Code)	Student’s Date of Birth
	Phone Number
E-mail Address	Student’s Social Security Number

**B. Independent Student’s Family/Household Information**

1. List **everyone** in your household using the table below. Be sure to include everyone in your family/household from each of the categories listed below as they apply to you:

- **Yourself.**
- **Your spouse**, if you are married.
- **Your and/or your spouse’s children** even if they are not claimed as dependents on your tax return or if they do not live with you, as long as
  - (a) you (and if married, your spouse) will provide more than half of their support from July 1, 2023 through June 30, 2024, or
  - (b) the children would be required to provide parental information when applying for Federal Student Aid.
- **Anyone else living in the household**, if you (and if married, your spouse) provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

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

2. Include the name of the college for 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.

Full Name	Age	Relationship	College	Will be enrolled at least half time
<i>(Example) Irene Adler</i>	<i>21</i>	<i>Spouse</i>	<i>Imperial College</i>	<i>Yes</i>
		<b>Self</b>	<b>Santa Clara University</b>	

### **C. Independent STUDENT'S Income Information to be Verified**

#### **Section 1:**

**COMPLETE THIS SECTION IF YOU (AND/OR YOUR SPOUSE, IF MARRIED) FILED A TAX RETURN IN 2021.**

*\*\*If you did **not** file a tax return in 2021, please **skip** this section and go on to Section 2.*

**Check the box that applies (check only one box):**

- I, the student, have used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer my (and, if married, my spouse's) 2021 IRS tax return income information into my FAFSA.
- I, the student (and, if married, my spouse) have not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information onto the FAFSA.
- I, the student (and, if married, my spouse) am unable or choose not to use the IRS Data Retrieval Tool in *FAFSA on the Web*, and instead has attached to this worksheet either:
- a) a **signed** copy of the 2021 IRS income tax return and applicable schedules, **or**
  - b) a copy of the 2021 IRS Tax Return Transcript.

#### **How to obtain a 2021 IRS Tax Return Transcript:**

- **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" (**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" (**NOT** the "Account Transcript"). To use the Get Transcript Online tool, the user must have the following: (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.

#### **Section 2:**

**IF YOU (AND/OR YOUR SPOUSE, IF MARRIED) DID NOT FILE A TAX RETURN IN 2021, EVEN IF YOU WORKED AND EARNED INCOME:**

**Check the box that applies (check only one box):**

- The student (and spouse, if any) was not employed and had no income earned from work in 2021.

Student name: \_\_\_\_\_ SCU ID: \_\_\_\_\_

The student (and spouse, if any) was employed in 2021 but did NOT file a tax return. *(Please follow instructions below.)*

**Students (and/or their spouse, if married) who were employed in 2021 but did not file a tax return**, please use the table provided below to list the names of all employers and the amount earned from each employer in 2021.

- List every employer even if they did not issue an IRS W-2 form.
- **Provide copies of all 2021 IRS W-2 forms** issued to the student.

**NOTE:** Failure to submit W-2 forms for students who did not file a tax return in 2021 will result in Santa Clara University being unable to complete the verification process.  
*If you are unable to obtain a W-2, please contact our office for additional instructions.*

Student to complete this information ONLY if they worked but did NOT file a tax return in 2021:

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2021
<i>(Example) Reichenback Falls Café</i>	Yes	\$2,000
Total Amount of Income Earned From Work		\$

**CONFIRMING OF NON-FILING DOCUMENT FROM THE IRS:**

**Required for all students (and their spouse, if married) who did *not* file a tax return.**

All students (and their spouse, if married) who did not file a tax return in 2021 (non-filers) must 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 non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

Check here if a confirmation of non-filing document from the IRS or a signed statement is provided.

Check here if a confirmation of non-filing document from the IRS or a signed statement will be submitted to Santa Clara University later. *(Instructions on following page.)*

A confirmation of non-filing document (also known as a Verification of Non-filing Letter) from the IRS may be obtained:

- **Online** – Go to [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript). Click “Get Transcript Online”. This option is not available if you have never filed taxes in prior years.
- **By Phone** – 1-800-829-1040.
- **By Mail**- Complete IRS Form 4506-T. Check box 7. The Verification of Non-Filing Letter will be mailed to you within 10 business days.

**NOTE:** Failure to submit W-2 forms and a confirmation of non-filing document from the IRS or a signed statement (for students who did **not** file a tax return in 2021) will result in Santa Clara University being unable to complete the verification process.  
*If you are unable to obtain a W-2 or a confirmation of non-filing from the IRS, please contact our office for additional instructions.*

**E. Certification and Signature**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. **The student must sign and date this form.** Spouse’s signature is optional. ***\*\*Please note that this must be signed by hand, typed or electronic signatures are not allowed.\*\****

Print Full Name (as it appears on your campus student records)	Date
Student’s Signature	

Print Full Name of Spouse (Optional)	Date
Spouse’s Signature (Optional)	

**WARNING:** If you purposely give false or misleading information on this form you may be fined, receive a prison sentence or both. All form(s), paperwork and documentation are property of Santa Clara University, and will be kept and maintained with file.