



2022-2023  
Verification Worksheet  
Dependent  
(V5)

Mail: Saint Martin's University  
Student Financial Services Office  
5000 Abbey Way SE  
Lacey, WA 98503  
P: (360) 438-4397  
F: (360) 412-6190

Your application has been selected for review in a process called "Verification". In this process, the information from your Free Application for Federal Student Aid (FAFSA) will be compared with you and your parent(s)' Federal IRS tax information as well as other financial documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent **must complete all sections of this worksheet, attach all required documents and submit them to the Student Financial Services Office.**

**STUDENT INFORMATION**

Last Name	First Name	M.I.	Student SMU ID Number
Address (include apartment number)			Date of Birth
City	State	Zip	Phone number (include area code)

**FAMILY INFORMATION**

Fill in the information below about the people your parent(s) will support between July 1, 2022 and June 30, 2023. INCLUDE YOURSELF, YOUR PARENT(S) (including Stepparent), YOUR SIBLINGS AND ANY OTHERS WHO RECEIVE MORE THAN HALF OF THEIR SUPPORT FROM YOUR PARENT(S). List the name of the college others will be attending if they are enrolled in a degree, diploma, or certificate program for at least six credits per term between July 1, 2022 and June 30, 2023.

Name	Age	Relationship to you	College Attending
		Self	Saint Martin's University

**INCOME VERIFICATION INSTRUCTIONS**

The easiest way to verify income is to use the IRS Data Retrieval Tool when completing or updating your FAFSA on the federal web site. If you did not use the IRS Data Retrieval Tool when completing or updating the 22-23 FAFSA, you should log back into the FAFSA and use the IRS Data Retrieval tool. If you need instructions to use the tool please visit our website and expand the HELP Forms section to find the IRS Date Retrieval Tool Help Form.

**If you are unable to use the IRS tool, you must request a 2020 IRS Tax Return Transcript or provide our office with a signed copy of you and your parent's 2020 IRS 1040, 1040A or 1040 EZ Tax Return. You can request a 2020 IRS Tax Return Transcript via [www.irs.gov](http://www.irs.gov) or call 1-800-908-9946. Be sure to request a 2020 Tax Return Transcript, NOT an Account Transcript. If you or your parent(s) did not and will not file a 2020 Federal tax return, please check the appropriate box below.**

**STUDENT INCOME (Please Select One Box)**

- I used/will use the IRS Data Retrieval process when completing/updating the 2022-23 FAFSA.
  - Please indicate the date you **used the tool /will use** the tool to transfer your 2020 Tax Filing \_\_\_\_\_
- My 2020 Federal IRS Tax Return or Transcript(s) is attached *or* I have requested a 2020 IRS Tax Return Transcript from the IRS. (Foreign tax return filers may submit signed photocopies.) **See Income Verification section above for important details.**
  - Please indicate the date you requested the 2020 IRS Tax Transcript \_\_\_\_\_
- I will not file and am not required to file a 2020 Federal tax return, but received a 2020 W-2
  - Write in the amount you earned in 2020 and **enclose all of your 2020 W-2s.** \$ \_\_\_\_\_
- I will not file and am not required to file a 2020 Federal Tax return and did not receive a W-2 in 2020.
  - If you earned wages in 2020 but did so through odd jobs, you must report these non W2 wages below.
  - Amount Earned \$ \_\_\_\_\_ Source of Income \_\_\_\_\_

**PARENT(S) INCOME (Please Select One Box)**

- My parent(s) used the IRS Data Retrieval process when completing/updating the 2022-23 FAFSA.
  - Please indicate the date you **used the tool/will use** the tool to transfer your 2020 Tax Filing \_\_\_\_\_
- My parent(s) 2020 Federal IRS Tax Return or Transcript(s) is/are attached *or* they have requested a 2020 Tax Return Transcript from the IRS. (Foreign tax return filers may submit signed photocopies.) **See Income Verification section above for important details.**
  - Please indicate the date you used requested the 2020 IRS Tax Transcript \_\_\_\_\_
- My parent(s) will not file and are not required to file a 2020 Federal tax return.
  - Write in the amount they earned in 2020 and **enclose all 2020 W-2s:** Father \$ \_\_\_\_\_ Mother \$ \_\_\_\_\_
- My parents will not file and are not required to file a 2020 Federal Tax Return and did not receive a W-2 in 2020. **If you select this option you must provide a Verification of Non-Filing Letter from the IRS, even if you earned zero wages in 2020.**
  - If you earned wages in 2020 but did so through odd jobs, you must report these non W2 wages below.
  - Amount Earned \$ \_\_\_\_\_ Source of Income \_\_\_\_\_

**IDENTITY/EDUCATIONAL PURPOSE STATEMENT**

You **MUST** appear in the Student Financial Services Office in person and present valid government-issued photo identification (driver's license, non-driver's license document, or passport).

In addition, you will be required to sign a **Statement of Educational Purpose** when **WHEN YOU ARE IN THE SFS OFFICE.**

**CERTIFICATIONS AND SIGNATURES**

By signing this worksheet, we certify that all of the information reported is complete and correct. We also acknowledge that we have read and agree to comply with all verification policies as stated by the University. **Failure to submit information in a timely fashion may result in the delay in the processing of your financial aid.** Student and one parent must sign:

Student \_\_\_\_\_ Date \_\_\_\_\_ Parent \_\_\_\_\_ Date \_\_\_\_\_

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**