

2023-2024 Dependent Student Custom Verification Worksheet

Student Name

Student ID

This form cannot be faxed or emailed! Student must return original in person to the Financial Aid Office!

Identity and Statement of Educational Purpose

(MUST Be Signed IN PERSON at the Financial Aid Office)

The student must appear in person at Rock Valley College to verify his or her identity by presenting a valid (unexpired) state issued photo ID, such as a driver's license, state issued ID or government issued passport. Rock Valley will maintain a copy of the student's identification that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review 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 _____ am the individual signing this
 (Print Student's Name)

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 Rock Valley College for 2023–2024.

 Student's Signature

 Student's ID Number

 Date

High School Completion Status

Provide **one** of the following documents to indicate the student's high school completion status:

- A copy of the student's high school diploma/transcripts which shows the date when the diploma was awarded.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- GED test, HiSET, TASC, or other State-authorized examination.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.
- A student who is unable to obtain the documentation listed above must contact the financial aid office.

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

 Student's Signature (required)

 Date

 Parent's Signature (required)

 Date

For office use only:

Statement of Educational Purpose was signed in my presence:

YES

NO

 Signature of Institutional Official

 Date

You should make a copy of this worksheet for your records. Please see reverse side for important tax information.

How to use the IRS Data Retrieval Tool

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA.

- Go to fafsa.ed.gov and Log in using your FSA ID
- Select the “Continue” or “Make a Correction” button
- Select the "Financial Information" tab from the top of the page
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool and If eligible, click "Link to IRS"
- Review the information displayed and select the “Transfer My Information into the FAFSA” option
- Proceed to the Sign and Submit page

Instructions for the parent to request their IRS information:

- Go to "Parent Financial Information" page
- Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool and if eligible, select which parent is providing information on the FAFSA
- Enter the FSA ID for the parent providing the information
- Click "Link to IRS"
- Review the information displayed and select the “Transfer My Information into the FAFSA” option
- Proceed to the Sign and Submit page

Verification of 2021 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2021;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2022;
- A copy of IRS Form W-2 for each source of employment income received for tax year 2021;
- If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2021 must provide:

- A **2021 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *and*
- A signed copy of the 2021 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was 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 any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *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.