



## 2023-2024 AGGREGATE VERIFICATION WORKSHEET (V5)

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and/or your parents reported on your FAFSA. The financial aid administrator at your school will compare your FAFSA with the information on this worksheet and any other required documents. If there are differences, your FAFSA information may need to be corrected. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

**Warning: This form will be rejected if it is incomplete or illegible...please complete carefully!**

### STEP 1 – STUDENT INFORMATION

<b>Last Name</b>	<b>First Name</b>	<b>Social Security Number</b>	<b>Student ID</b>
<b>Permanent Address</b>	<b>Street &amp; Number</b>	<b>City/State/Zip</b>	
<b>Home Phone</b>	<b>Cell Phone</b>	<b>Email Address</b>	

### STEP 2 – FAMILY INFORMATION: check one of the following/supply information accordingly

**Independent Students:** List the people in your household:

- Yourself and your spouse, if married
- Your children, if you provide more than half of their support from July 1, 2023, through June 30, 2024
- Any other people if they now live with you and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2023, through June 30, 2024.

**Dependent Students:** List the people in your parents’ household:

- Yourself, your parent(s) you live with (include stepparent), must include both of dependent student’s legal (biological and adoptive) parents if they live together regardless of marital status or gender.
- Your parents’ other children if your parent(s) will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if they do not live with your parent(s).
- Any other people if they now live with your parents and your parents provided more than half of their support and will continue to provide more than half of their support from July 1, 2023, through June 30, 2024.

### PLEASE LIST ALL HOUSEHOLD MEMBERS BELOW.

**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.

<b>Full Name</b>	<b>Age</b>	<b>Relationship to student</b>	<b>Name of College or University (if at least ½ time 2023-2024)</b>
<i>Joshua Jones (EXAMPLE)</i>	<i>24</i>	<i>Self</i>	<i>Example University</i>

### STEP 3 – STUDENT OR STUDENT/SPOUSE (FILING JOINT) FILING INFORMATION

Please check one box below that applies to the student or student and spouse (if filing joint):

<input type="checkbox"/>	The student <b>HAS</b> used the data retrieval tool on the FAFSA. The IRS data retrieval tool allows students to transfer their income information from the IRS directly to the FAFSA. If the student used this tool, they will NOT need to submit 2021 IRS tax return transcripts.								
<input type="checkbox"/>	The student is <u>unable</u> or chooses not to use the IRS Data Retrieval Tool on the FAFSA, the student will submit a <b>2021 Form 1040 SIGNED</b> or a <b>2021 IRS tax return transcript</b> , instructions attached.								
<input type="checkbox"/>	The student was unemployed and had no income earned from work in 2021 and student will submit a <b>“Verification of Non-Filing”</b> (requests not issued until after June 15, 2021), instructions attached. <b>***verification of non-filing is NOT required for <u>dependent students</u>***</b>								
<input type="checkbox"/>	<p>The student was employed in 2021 and did not file a tax return. Please list below the names of all the student’s employers, the amount earned from each employer in 2021.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Employer’s Name</th> <th style="text-align: center;">2021 Amount Earned</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><i>Suzy’s Auto Body Shop (example)</i></td> <td style="text-align: center;"><i>\$2,000.00(example)</i></td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table> <p><b>-W-2 is required if you check this box and student must submit a “Verification of Non-Filing</b>, Instructions attached. <b>***verification of non-filing is NOT required for <u>dependent students</u>***</b></p>	Employer’s Name	2021 Amount Earned	<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>				
Employer’s Name	2021 Amount Earned								
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>								

### STEP 4 – PARENT OR SPOUSE (FILING SEPARATE) FILING INFORMATION

Please check one box below that applies to parent(s) or spouse (if filing separately):

<input type="checkbox"/>	The parent(s)/spouse <b>HAVE</b> used the data retrieval tool on the FAFSA. The IRS data retrieval tool allows parent(s)/spouse to transfer their income information from the IRS directly to the FAFSA. If a parent(s)/spouse used this tool they will NOT need to submit tax transcripts.								
<input type="checkbox"/>	The parent(s)/spouse is <u>unable</u> or chooses not to use the IRS Data Retrieval Tool on the FAFSA, the parent(s)/spouse will submit a <b>2021 Form 1040 SIGNED</b> or a copy of the parent(s)/spouse <b>2021 IRS tax return transcript(s)</b> , instructions attached.								
<input type="checkbox"/>	The parent(s)/spouse were unemployed and had no income earned from work in 2021 and will submit a <b>“Verification of Non-Filing”</b> , (requests not issued until after June 15, 2021), instructions attached.								
<input type="checkbox"/>	<p>The parent(s)/ spouse were employed in 2021 and did not file a tax return. Please list below the names of all the parent’s/ spouse employers, the amount earned from each employer in 2021.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Employer’s Name</th> <th style="text-align: center;">2021 Amount Earned</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><i>Suzy’s Auto Body Shop (example)</i></td> <td style="text-align: center;"><i>\$2,000.00 (example)</i></td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table> <p><b>-W-2 is required, if you check this box and parent or spouse must submit a “Verification of Non-Filing”</b>, instructions attached</p>	Employer’s Name	2021 Amount Earned	<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>				
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## STEP 5 – Identity and Statement of Educational Purpose

The student must choose (A) or (B) to fulfill the requirements.

- A. Student must appear in person at Keystone College to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. The institution will maintain a copy of the student’s photo ID 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 Statement of Educational Purpose provided below.

- B. Student is unable to appear in person at Keystone College to verify his or her identity, the student must provide:
1. A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver’s license, other state-issued ID, or passport; *and*
  2. The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

## STEP 6 – CERTIFICATION AND SIGNATURES

I certify that I \_\_\_\_\_, am the individual signing this statement of Education 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 Keystone College for 2023-2024.

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent’s Signature

\_\_\_\_\_  
Date

*\*Please make a copy for your records*

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

**\*\*\*Use this sheet if you chose Step 5- A (to be completed in the presence of a Keystone College official) \*\*\***

**STATEMENT OF EDUCATIONALPURPOSE**

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 Keystone College for 2023-2024.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

Keystone College Official

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\*\*\*Use this sheet if you chose Step 5-B (to be completed in the presence of a notary) \*\*\*

\*\*\*If this form is used you must mail to us the original document, we cannot accept fax, scan, or emailed copies\*\*\*

**STATEMENT OF EDUCATIONALPURPOSE**

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 Keystone College for 2023-2024.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

**NOTARY'S CERTIFICATEOF ACKNOWLEDGEMENT**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_

(Date)

(Notary's name)

personally appeared, \_\_\_\_\_, and provided to me

(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_

(Type of government-issued photo ID provided)

to be the above-named person who signed the forgoing instrument.

**WITNESS my hand and official seal**

\_\_\_\_\_  
(Notary signature)

(seal here)

My commission expires on \_\_\_\_\_

(Date)

# Instructions on Requesting Tax Information

## Requesting a Tax Return Transcript

You will need your Social Security Number, date of birth, a valid email address, and the address on file with the IRS (normally this will be the address used when your 2021 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you are married and you and your spouse filed separate 2021 tax returns, you must submit tax return transcripts for both you and your spouse.

- 1) Go to [www.irs.gov](http://www.irs.gov)
- 2) Under tools, select **GET YOUR TAX RECORD**

Get Transcript Online	Get Transcript by Mail
<p><b>What You Need</b></p> <p>To register and use this service, you need:</p> <ul style="list-style-type: none"><li>• your <a href="#">SSN</a>, date of birth, filing status and mailing address from latest tax return,</li><li>• access to your email account,</li><li>• your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and</li><li>• a mobile phone with your name on the account.</li></ul> <p><b>What You Get</b></p> <ul style="list-style-type: none"><li>• All <a href="#">transcript types</a> are available online</li><li>• View, print or download your transcript</li><li>• Username and password to return later</li></ul>	<p><b>What You Need</b></p> <p>To use this service, you need your:</p> <ul style="list-style-type: none"><li>• <a href="#">SSN</a> or <a href="#">Individual Tax Identification Number (ITIN)</a>,</li><li>• date of birth, and</li><li>• mailing address from your latest tax return</li></ul> <p><b>What You Get</b></p> <ul style="list-style-type: none"><li>• Return or Account <a href="#">transcript types</a> delivered by mail</li><li>• Transcripts arrive in <b>5 to 10 calendar days</b> at the address we have on file for you</li></ul>

## **Requesting Documents for Amended Tax Returns**

If you or your parent(s)/spouse have filed an amended IRS tax return, you are required to provide the documents below to complete verification.

- A copy of the 2021 IRS Tax Return Transcript (per above instructions), or any IRS tax transcript that includes all the income and tax information required to be verified, and
- A signed copy of the 2021 IRS Form 1040X that was filed with the IRS.

## **Request for Verification of Non-Filing Letter**

Non-tax filers must request a Verification of Non-Filing Letter from the Internal Revenue Service (IRS), free of charge. You can only request via mail. Please note that current year requests are only available after June 15<sup>th</sup>.

### Paper Request

1. Download the IRS Form 4506T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
2. Print form off and complete lines 1-4. On line 7, check the box to indicate you would like to receive a Verification of Non-Filing, proof that you did not file a return for the year
3. On line 9 indicate the ending date on the year or period. For 23-24 verification the date should be 12/31/2022.
4. Mail or fax the form to the correct location based on where you live. Use 2<sup>nd</sup> Page of 45067T to determine this address or fax number.
5. The Verification Letter of Non-Filing will be mailed to you within 10 business days.

### **Submit this worksheet to:**

Keystone College  
Student Central  
Att. Financial Aid  
One College Green  
LA Plume, PA  
18440

Phone: 570-945-8300 FAX: 570-945-8967

Email: [financialaid@keystone.edu](mailto:financialaid@keystone.edu)

Please make a copy for your records.