

## 2022-23 Dependent Verification Worksheet – V1

The Department of Education randomly selected your 2022-23 Free Application for Federal Student Aid (FAFSA) for a review process called Verification.

We cannot continue processing or reviewing your application for federal or state aid until all requested items have been submitted.

Please complete this worksheet in full with a student and a parent signature and submit it with any requested supporting documents to the BCU Financial Aid Office at the above address. If there are differences between your FAFSA application information and these verification documents BCU will make the necessary corrections to your FAFSA information.

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_

Student Home Street Address: \_\_\_\_\_

Student Home City/State/Zip: \_\_\_\_\_

Student E-Mail Address: \_\_\_\_\_ Phone #: \_\_\_\_\_

### Student's Family Information:

List below the people in your parent's household. **Include all of the following:**

- Yourself (the student)
- Your parent(s) including a stepparent, even if you do not live with your parent
- Your parent(s) other children, if your parents will provide more than half of their support from July 1, 2022 through June 30, 2023, even if they do not live with your parents
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their financial support and will continue to provide more than half of their financial support through June 30, 2023
- *If more space is needed, attach a separate page with your name and SSN at the top.*

Full Name	Age	Relationship	College
		<i>Self</i>	<i>BCU</i>

**In the 'College' column above:** Include the name of the college for all listed household members (**excluding parents**) who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2022 and June 30, 2023.

Student Name \_\_\_\_\_

Student ID: \_\_\_\_\_

Student: Did you file a US 2020 Federal Income Tax Return?

Yes-Complete Box A  
No-Complete Box B (and C if required)

Box A:

<input type="checkbox"/>	I successfully linked the IRS information onto my FAFSA (IRS Data Retrieval)
<input type="checkbox"/>	I successfully made a correction to my FAFSA and linked the IRS information (IRS Data Retrieval)
<input type="checkbox"/>	I am unable or chose not to link IRS information onto my FAFSA. Instead I am providing a <b>signed</b> copy of my Federal 2020 Tax Return and applicable schedules (If you did not keep a copy of your tax return-see page 3 for instructions to obtain the IRS 2020 Tax Return Transcript)

Box B:

<input type="checkbox"/>	I was not employed in 2020 and had no income from work.
<input type="checkbox"/>	I was employed in 2020, but income was less than the tax filing requirement. (See page 3 for IRS 2020 Tax Return Filing Requirements) <b>Complete Box C</b>

Box C:

**Student Non-Tax Filer Information:** List below all income sources and amounts earned from working during 2020. Also state Yes or No whether a W-2 was received and provide a copy of the W-2.

Income Source	2020 Amount Earned	2020 W-2 Provided

Parent(s): Did you file a US 2020 Federal Income Tax Return?

Yes-Complete Box A  
No-Complete Box B (and C if required)

Box A:

<input type="checkbox"/>	We/I successfully linked the IRS information onto the FAFSA (IRS Data Retrieval)
<input type="checkbox"/>	We/I successfully made a correction to the FAFSA and linked the IRS information (IRS Data Retrieval)
<input type="checkbox"/>	We/I are unable or chose not to link IRS information onto the FAFSA. Instead We/I are providing a <b>signed</b> copy of our Federal 2020 Tax Return(s) and applicable schedules (If you did not keep a copy of your tax return-see page 3 for instructions to obtain the IRS 2020 Tax Return Transcript)

Box B:

<input type="checkbox"/>	We/I were not employed in 2020 and had no income from work.
<input type="checkbox"/>	We/I were employed in 2020, but income was less than the tax filing requirement. (See page 3 for IRS 2020 Tax Return Filing Requirements) <b>Complete Box C</b>

Box C:

You will need to provide BCU with:

- \* IRS Verification of Non-Tax filing letter
- \* Complete Parent Non-Tax Information box below
- \* Provide copies of your W-2s

**Parent Non-Tax Filer Information:** List below all income sources and amounts earned from working during 2020. Also state Yes or No whether a W-2 was received and provide a copy of the W-2.

Income Source	2020 Amount Earned	2020 W-2 Provided

**Student and Parent Physically Sign this Worksheet (Electronic or typed signatures cannot be accepted)**

Each person signing this form certifies that all information reported on it is complete and correct. *Warning: If you purposely give false or misleading information on this worksheet, you may be fined up to \$20,000, sent to prison, or both.*

\_\_\_\_\_  
Student Signature and Date

\_\_\_\_\_  
Parent Signature and Date

If you have questions regarding this process, please call the Financial Aid Office at 800-662-3303 or e-mail [financial.aid@briarcliff.edu](mailto:financial.aid@briarcliff.edu).

Submit completed worksheet and documentation in one of the following ways:

Fax: 712-279-5410

Scan and e-mail: [financial.aid@briarcliff.edu](mailto:financial.aid@briarcliff.edu)

Physically mail to or drop off at:

Briar Cliff University

Financial Aid Department

3303 Rebecca Street, Sioux City, Iowa 51104

You may not be able to use the IRS Data Retrieval Tool to add your information to the FAFSA if any of the following are true:

- You did not indicate on the FAFSA that the tax return has been completed
- Your marital status changed on or after January 1, 2021
- The first three digits of your SSN are 666
- You filed a non-US tax return
- You are married and filed the tax return as Head of Household or Married filing a separate return
- Neither parent entered a valid SSN
- Your biological parents are living together but not married (cannot file tax return as Married filing Jointly)

In the above situations an IRS 2020 Tax Return Transcript will be required.

**Amended Tax Return Filers:**

- If you used the IRS Data Retrieval Tool, we would need a copy of your signed 2020 1040X form
- If you did not use the IRS Data Retrieval Tool, we will need both:
  - A copy of your 2020 signed 1040X form
  - IRS 2020 Tax Return Transcript or signed copy of Federal 2020 Tax Return and applicable schedules

**Tax Filing Income Requirements:**

Filing Status	Age on December 31, 2020	Required to file 2020 taxes if your income was at or above:
Dependent Student	Any age	\$12,400
Single	Under 65	\$12,400
	65 or older	\$14,050
Married filing Jointly	Both spouses under 65	\$26,100
	One spouse 65 or older	\$25,300
	Both spouses 65 or older	\$27,400
Married filing Separately	Any age	\$5
Head of Household	Under 65	\$18,650
	65 or older	\$20,600
Qualifying Widow(er)	Under 65	\$24,800
	65 or older	\$26,100
Self-Employed	Any Age	Net Earnings were \$400 or more

**Option to obtain the IRS 2020 Tax Return Transcript or Verification of Non-Filing letter**

- Call the IRS at 800-908-9946 or 800-829-1040
- Online at [www.irs.gov](http://www.irs.gov)
  - Get Your Tax Record
    - Get Transcript On-line (requires a lot of information but the tax return transcript appears on your monitor and can be saved as a pdf.)
    - Get Transcript by Mail (takes 7-10 days to arrive)
    - Be sure you are requesting the 2020 Tax Return Transcript
- Mailing or faxing the paper form 4506-T to the IRS.
- Going to your local Federal IRS tax office to request it in person.