

2022-23 Independent Verification Worksheet – V1

The Department of Education 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 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 household. **Include all of the following:**

- Yourself (the student)
- Your spouse (if married)
- Your or your spouse’s children, if you and/or your spouse will provide more than half of their financial support from July 1, 2022 through June 30, 2023, even if the child does not live with you
- Other people if they now live with you and you and/or your spouse 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 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: _____

- If you were married at the time of signing the FAFSA, you need to provide the following information for both you and your spouse.

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/We successfully linked the IRS information onto my FAFSA (IRS Data Retrieval)
<input type="checkbox"/>	I/We successfully made a correction to my FAFSA and linked the IRS information (IRS Data Retrieval)
<input type="checkbox"/>	I/We am unable or chose not to link IRS information onto my FAFSA. Instead I am providing a signed 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/We was/were not employed in 2020 and had no income from work.
<input type="checkbox"/>	I/We was/were employed in 2020, but income was less than the tax filing requirement. (See page 3 for IRS 2020 Tax Return Filing Requirements) Complete Box C.

Box C:

You will need to provide BCU with:			* IRS Verification of Non-Tax filing letter
			* Complete Information below
			* Provide copies of your W-2s
Student and Spouse 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 Physically Sign this Worksheet (Electronic or typed signatures cannot be accepted)

By signing this form, you certify 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

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.

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

Fax: 712-279-5410

Scan and e-mail: 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

In the above situations an IRS 2020 Tax Return Transcript or signed copy of Federal 2020 Tax Return and applicable schedules will be required.

Amended Tax Return Filers:

- If you used the IRS Data Retrieval Tool, we will need a signed 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	\$12,000
Single	Under 65	\$12,000
	65 or older	\$13,600
Married filing Jointly	Both spouses under 65	\$24,000
	One spouse 65 or older	\$25,300
	Both spouses 65 or older	\$26,600
Married filing Separately	Any age	\$5
Head of Household	Under 65	\$18,000
	65 or older	\$19,600
Qualifying Widow(er)	Under 65	\$24,000
	65 or older	\$25,300
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
- On line at www.irs.gov
 - Get Your Tax Record
 - Get Transcript OnLine (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