

V5: Independent Verification Worksheet 2024-2025

Student Name _____ MBU ID _____

Address _____ City _____ State _____ Zip Code _____

Student's Primary Phone # _____ Student's Primary Email Address _____

Spouse (if married) Primary Phone # _____ Student's Marital Status _____

SECTION 1: FAMILY SIZE

Instructions: Complete the below chart for your family size according to the FAFSA definition.

SECTION 2: VERIFICATION OF 2022 INCOME INFORMATION FOR STUDENT TAX FILERS

Instructions: Complete this section if the student and spouse (if married) **filed or will file** a 2022 IRS income tax return(s). Check all that apply:

I/We consented to transfer the 2022 IRS income tax information and **it was successfully transferred** into the FAFSA.

- In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

I/We consented to transfer the 2022 IRS income tax information and **it was not transferred** into the FAFSA.

- If the 2022 income tax return information for student and spouse (if applicable) was not available or could not be used, provide the MBU Financial Aid Office with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules. If the student and spouse (if applicable) filed "**married filing separately**", **both** the student and spouse's tax return transcripts for 2022 will need to be sent to us.

A 2022 IRS Tax Return Transcript may be obtained through:

- **Get Transcript Online**
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Get Transcript by Mail**
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Automated Telephone Request**
 - Call 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

SECTION 3: VERIFICATION OF 2022 INCOME FOR NON-TAX FILERS

Instructions: Complete this section ONLY if the student and/or spouse will not, and were not required to, file a 2022 income tax return with the IRS. Follow each of the steps below.

Step 1: Student Non-Tax Filer - check the appropriate box below:

Student was not employed and had no income earned from work in 2022.

Student was employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes the student’s name and MBU ID.

Employer’s Name	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2022
		\$
		\$
		\$
		\$
Total amount of income earned from work		\$

Step 2: Spouse Non-Tax Filer. Check the appropriate box below:

Spouse was not employed and had no income earned from work in 2022.

Spouse was employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form.

Additional documentation may be required if you are reporting income from a person signing below. See the instructions for more information. (Required)

Student Name _____

MBU ID _____

Instructions: Complete Section A or Section B.

Section A: CAN YOU APPEAR IN PERSON AT MARY BALDWIN UNIVERSITY? YES - Complete only Section A in person at MBU

The student must appear in person at the Mary Baldwin University Office of Financial Aid to verify his/her/their identity by presenting an unexpired government-issued photo identification (ID), such as (but not limited to) a driver's license, other state-issued ID, or passport.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Section B: CAN YOU APPEAR IN PERSON AT MARY BALDWIN UNIVERSITY? NO - Complete only Section B in the presence of a