



2023-2024 V5 VERIFICATION WORKSHEET

Your Free Application for Federal Student Aid (FAFSA) was selected for a review called verification. The CAU Office of Financial Aid will confirm information from your FAFSA and your (spouse's/parent's) 2021 Federal Tax Transcripts/Return, W-2 forms and other financial documentation. According to Federal law, we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, CAU will update/adjust your FAFSA accordingly. If you have questions about verification, contact our office as soon as possible so your financial aid will not be delayed.

STUDENT INFORMATION

Last Name *First Name* *Social Security Number* *Clark Atlanta University ID Number*

Permanent Address Street *City/State/Zip* *Date of Birth*

Cell Number (Include Area Code) *Permanent Phone Number (include area code)* *CAU email address*

STEP 2 FAMILY INFORMATION: SEE ATTACHMENT FOR INSTRUCTIONS

If you are a Dependent student include:

- Your parent(s) other dependent. Yourself.
- Your parent(s) you live with. *(including step-stepparent).*
- Any parent who lives outside of the household if parents are still legally married to each other, *(including step-stepparent),*
- Your parent(s) other dependent children if: (a) your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024, or (b) the children will be required to provide parental information when applying for Federal Student Aid.
- Other people only if they now live in your parent(s) household and your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024.

If you are an Independent student include:

(You are independent if you are married, have children that you support, 24 years of age or older, active military duty, or documented orphan/ward of the court.)

- Yourself
- Your spouse (if you are married)
- Your children if you will provide more than half of their support from July 1, 2023 through June 30, 2024.
- Other people only if they live in your household and you provide more than half of their support and will continue to do so from July 1, 2023 through June 30, 2024.

FULL NAME	AGE	RELATIONSHIP ex: parent/sister/brother	NAME OF COLLEGE	Will be enrolled at least half time 2023-2024 (YES/NO)
		<i>Self</i>	<i>Clark Atlanta University</i>	
		<i>Parent</i>		
		<i>Parent</i>		

STEP 3 STUDENT'S 2021 INCOME INFORMATION (MAKE ONLY 1 SELECTION, ITEMS 1-4)

- 1. The student was not employed and had no income earned from work in 2021. Complete Student Non-Filing Statement below.
- 2. The student was employed but did not file taxes for 2021. Submit student's W-2(s) and complete Student Non-Filing Statement below.

To obtain your W-2:

- a. Contact your employer or former employer.
- b. IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Check the box for Form W-2, specify which tax year(s) you need, and mail or fax the completed form. Allow 10 business days from the IRS received date to receive the transcript.

- 3. The student filed taxes for 2021 and used the IRS DRT to transfer income tax information into the FAFSA. The CAU Office of Financial Aid will notify you if additional tax information is needed.
- 4. The student filed taxes for 2021 but unable to or choose not to use the IRS DRT and instead will provide the 2021 IRS Tax Return Transcript (see page 3) or submit **signed** 1040 U.S. Individual Income Tax Return (pages 1 & 2 and Schedules 1, 2, and 3) and all W-2s associated with your taxes.

STUDENT NON-FILING STATEMENT:

The statement below must be completed **if the student did not and was not required to file a tax return for 2021.**

I, _____, certify that Federal Law does not require me to file a 2021 Federal Tax Return.

STUDENT'S SIGNATURE: _____

STEP 4 PARENT/SPOUSE'S 2021 INCOME INFORMATION (MAKE ONLY 1 SELECTION, ITEMS 1-4)

- 1. The parent/spouse was not employed and had no income earned from work in 2021. Attach parent's 2021 Verification of Non-Filing Letter from the IRS, see page 3 for instructions.
- 2. The parent/spouse was employed and did not file taxes for 2021. Submit parent's W-2(s) and 2021 Verification of Non-Filing Letter (see page 3) from the IRS.

To obtain your W-2:

- a. Contact your employer or former employer.
- b. IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Check the box for Form W-2, specify which tax year(s) you need, and mail or fax the completed form. Allow 10 business days from the IRS received date to receive the transcript.

- 3. The parent/spouse filed taxes for 2021 and used the IRS DRT to transfer income tax information into the FAFSA. The CAU Office of Financial Aid will notify you if additional tax information is needed.
- 4. The parent/spouse filed taxes for 2021 but unable to or choose not to use the IRS DRT and instead provide the 2021 IRS Tax Return Transcript (see page 3) or submit **signed** 1040 U.S. Individual Income Tax Return (pages 1 & 2 and Schedules 1, 2, and 3) and all W-2s associated with your taxes.

STEP 5 CERTIFICATION and SIGNATURE: Each person signing below certifies that all of the information reported is complete and correct.

Warning: If you purposely give false or misleading information you may be fined, sent to prison or both.

Student Signature (DO NOT TYPE) Date

Parent Signature (DO NOT TYPE) (if student is dependent) / Spouse Signature (optional) Date

Last Name: _____ CAU ID#: _____

IDENTITY and STATEMENT of EDUCATIONAL PURPOSE

If you are unable to complete the IDENTITY AND STATEMENT OF EDUCATION PURPOSE in person, please have the next page notarized and submit to the CAU Office of Financial Aid via US Mail to the address listed above.

The student must appear in person at Clark Atlanta University 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 Education Purpose provided below:

Identity and Statement of Educational Purpose

I certify that I _____ am the individual signing this 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 Clark Atlanta University for 2023-2024.

Student’s Signature

Student ID Number

Date

Financial Aid Administrator’s Signature

Date

Last name: _____ CAU ID#: _____

IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE

Submit this page if you are unable to complete the previous page in person. Keep a copy for your records and mail the completed ORIGINAL via US MAIL to the CAU Office of Financial Aid (see first page). WE CANNOT PROCESS A COPY. DO NOT FAX THIS PAGE.

If the student is unable to appear in person at Clark Atlanta University to verify his or her identity, the student must provide to the institution:

- ✓ 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
- ✓ 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 Education Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this 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 Clark Atlanta University for 2023-2024.

Student 's Signature Student ID Number _____ Date

Notary’s Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____

Date

Notary’s Name

Personally appeared, _____, and proved to me

Printed Name of Signer

on the basis of satisfactory evidence of identification _____

Type of unexpired government-issued photo ID provided

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

WITNESS my hand and official seal _____

Notary Signature

My commission expires on _____ *Date*

Instructions for obtaining additional required information:

2021 IRS TAX FILING THRESHOLD

If you are unsure if your **required** to file taxes for 2020, refer to the IRS tax filing threshold provided:

Filing Status	Age	Gross Income
Single	Under 65	\$12,400
Single – claimed as dependent	Under 65	\$14,050 Earned Income \$2,750 Unearned Income
Single	65 or Older	\$14,050
Head of Household	Under 65	\$18,650
	65 or Older	\$20,300
Married Filing Jointly	65 or Older (one spouse)	\$26,100
	Under 65 (both spouses)	\$24,800
	65 or Older (both spouses)	\$27,400
Married Filing Separately	Any Age	\$5.00
Qualifying Widow(er)	Under 65	\$24,800
	65 or Older	\$26,100
Self Employed	Any Age	\$400

PARENTS NOT REQUIRED TO FILE: HOW TO OBTAIN THE IRS NON-FILING LETTER

- Go to www.irs.gov, click “Get Your Tax Record.”
- Click “Get Transcript ONLINE” (If at any point, you cannot validate your identity – for example you cannot provide financial verification information or you lack access to a mobile phone – you will need to use the Get Transcript by MAIL option, see below for instructions).
- Enter the non-filer’s Social Security Number (you can use your ITIN or EIN), e-mail address, filing status, account numbers for loan or credit card associated with your name, and mobile phone associate with your name. This information will be used to verify your identity with the IRS.
- Click “Continue”.
- Select “Verification of Non-filing Letter” for TAX YEAR 2021
- If successfully validated, you will be able to view your IRS Verification of Non-filing letter that you can print it out for submission.

IRS DRT INSTRUCTIONS

- Log in to your current **FAFSA form** or start a new application at studentaid.gov.
- In the finances section of the online form, you will see a “Link to IRS” button if you are eligible to use the IRS DRT.
- Click the “Link to IRS” button and log in with your **FSA ID** to be transferred to the IRS to retrieve your information.
- Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the “Submit” button.
- Check the “Transfer My Tax Information into the FAFSA form” box, and click the “Transfer Now” button.
- You will know that your federal tax return information has been successfully transferred because the words “Transferred from the IRS” will display in place of the IRS information in your FAFSA form.

REQUEST TRANSCRIPT ONLINE

- Go to www.irs.gov, click “Get Your Tax Record.”
- Click “Get Transcript Online.” Make sure to request “Tax 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.