

# PEPPERDINE | SCHOOL OF PUBLIC POLICY

## 2022–2023 V1 Standard Verification Worksheet Independent Student

Your 2022–2023 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 reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

### Student's Information

|                                                 |            |      |                                          |
|-------------------------------------------------|------------|------|------------------------------------------|
| Student's Last Name                             | First Name | M.I. | Campus Wide ID (CWID)                    |
| Student's Street Address (include apt. no.)     |            |      | Student's Date of Birth                  |
| City State Zip Code                             |            |      | Student's Email Address                  |
| Student's Home Phone Number (include area code) |            |      | Student's Alternate or Cell Phone Number |

### Student's Family Information

In the table below list the people in your household. Include:

- Yourself.
- Your spouse, if you married.
- Your children if you or your spouse will provide more than half of their support from July 1, 2022, through June 30, 2023, even if the children do not live with you.
- Other people if they now live with you and you or your spouse provides more than half of your support and will continue to provide more than half of your support through June 30, 2023.

For any household member who 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, 2022, and June 30, 2023, include the name of the college.

*If more space is needed, provide a separate page with the student's name and ID number at the top.*

| Full Name | Age | Relationship | College               | Will be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|-----------------------|-------------------------------------------------|
|           |     | Self         | Pepperdine University |                                                 |
|           |     |              |                       |                                                 |
|           |     |              |                       |                                                 |
|           |     |              |                       |                                                 |
|           |     |              |                       |                                                 |
|           |     |              |                       |                                                 |

*Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.*

Student's Name: \_\_\_\_\_ CWID \_\_\_\_\_

## Verification of 2020 Income Information for Student Tax Filers

**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

**Instructions:** Complete this section if the student and spouse filed or will file a 2020 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

- ☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.
- ☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student's FAFSA.
- ☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules**.

A **2020 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to [www.irs.gov](https://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.
- **Get Transcript Online** – Go to [www.irs.gov](https://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.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** must be provided for each.

\_\_\_\_ Check here if a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** is provided.

\_\_\_\_ Check here if a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** will be provided later.

## Verification of 2020 Income Information for Individuals with Unusual Circumstances

### Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2020 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2020, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2020;
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2021 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2020 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2020.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2020 tax account information.

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2020 must provide a signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return;
- A **2020 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2020 IRS Form 1040 and the applicable schedules that were filed with the IRS.

#### Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2020 income tax return and applicable schedules the individual filed with the IRS; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

#### Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

#### Income Information for Student Nontax Filers

Complete this section if the student and spouse will not file and are not required to file a 2020 income tax return with the IRS. In addition: You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2020 IRS income tax return was not filed with the IRS or other relevant tax authority. Please see instructions on your **WaveNet** to-do list. For more information regarding filing requirements for most taxpayers, please refer to the 2020 IRS Publication 501: <https://www.irs.gov/pub/irs-prior/p501--2020.pdf>

- The student and/or spouse were not employed and had no income earned from work in 2020.
- The student and/or spouse were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. Provide copies of all 2020 IRS W-2 forms issued to the student and/or spouse by their employers. List every employer even if they did not issue an IRS W-2 form.

*If more space is needed, provide a separate page with the student's name and CWID included.*

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2020 |
|-----------------|---------------------------------------------|------------------------------|
|                 |                                             |                              |
|                 |                                             |                              |
|                 |                                             |                              |
|                 |                                             |                              |
|                 |                                             |                              |

#### Certifications and Signatures

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

Each person signing below certifies that all of the information reported is complete and correct.

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Campus Wide ID (CWID)

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (Optional)

\_\_\_\_\_  
Date

**Submit this completed & signed document to the Financial Aid Office via fax to: 310-506-7494**

**or email to: [christopher.j.jones@pepperdine.edu](mailto:christopher.j.jones@pepperdine.edu)**