



Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for a federal review process called verification. Before finalizing your award or disbursing financial aid, we must ask you to confirm the information you reported on your FAFSA. You (and your spouse, if applicable) must complete and sign this worksheet and submit it along with any other required documents to our office.

For more information about verification visit our web page, [www.longwood.edu/financialaid/](http://www.longwood.edu/financialaid/), and click on FAFSA Verification.

## A. STUDENT INFORMATION

Full Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Longwood ID Number: \_\_\_\_\_ Email: \_\_\_\_\_

## B. HOUSEHOLD INFORMATION

Please **complete all columns** of the table below for the people living in your household, including:

- Yourself (the student).
- Your spouse, if you are married.
- Any children, if you will provide more than half of their support from July 1, 2022 through June 30, 2023 OR if the child would be required to provide your information if they were completing a FAFSA for 2022-2023. Include children who meet either of these standards, 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 the other person's support, and will continue to provide more than half of their support between July 1, 2022 and June 30, 2023.
- If the family member will be enrolled at least half-time in a degree seeking college program, please list the college or university they will attend.

Full Name (including student)	Age	Relationship to Student	Enrolled at least ½ time toward a degree? If yes, list college name	
		Student	<input type="checkbox"/> Yes <input type="checkbox"/> No	Longwood University
		Spouse	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		Child	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		Child	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		Child	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		Child	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		Other:	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		Other:	<input type="checkbox"/> Yes <input type="checkbox"/> No	

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Name: \_\_\_\_\_ Longwood ID Number: \_\_\_\_\_

### C. STUDENT (AND SPOUSE) INCOME INFORMATION

Check **one** of the following options:

The IRS Data Retrieval Tool was used to transfer 2020 IRS income information to the FAFSA.	
A copy of the 2020 Tax Transcript <b>or</b> signed 2020 Tax Return (1040 and Schedules 1, 2, & 3 if filed) will be submitted with this form.	
NO income was earned in the 2020 tax year, and therefore no taxes were filed. A 2020 Verification of Non-Filing will be submitted with this form ( <i>see final page for more information</i> ).	
Income was earned in 2020, but tax filing was not required. The table below has been completed, and all of the following will be submitted with this form: 1. Copies of all 2020 W-2s for student (and spouse if applicable) 2. Copy of the student (and spouse's) 2020 Verification of Non-Filing ( <i>see final page for more information</i> )	
Place of Employment	Wages Earned (listed in Box 1 of W-2)

### D. CERTIFICATION AND SIGNATURES

**Warning:** If you purposely give false or misleading information, you may be fined, sent to prison, or both. Each person signing this worksheet certifies that all of the information reported on it is complete and correct. *The student (and spouse, if applicable,) must sign and date.*

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date

For the security of your personal data, please submit your completed form and all other requested documents using our secure upload, found here: [go.longwood.edu/uploadfa](https://go.longwood.edu/uploadfa)

## **Options to Submit Tax Information**

### **IRS Data Retrieval Tool**

The most efficient and time-saving way to verify income is by using the IRS DATA Retrieval Tool (IRS DRT) that is part of the FAFSA on the Web at FAFSA.gov.

1. Log in to your FAFSA and select the 2022-2023 FAFSA, then select Edit FAFSA Form.
2. Under the Financial Information tab you will see a question asking if you completed your tax return for 2020. Select Already Completed and the Link to IRS option will appear, if eligible.
3. Select Link to IRS and follow prompts to enter the IRS website.
4. Once on the IRS site enter all information requested and select Submit.
5. Please be sure to check Transfer My Tax Information into the FAFSA Form followed by Transfer Now.
6. Once transferred successfully you should see a message that reads Transferred from the IRS.

### **Requesting the Tax Return Transcript *or* Verification of Non-Filing**

Online Request – [www.irs.gov](http://www.irs.gov). Click Get Your Tax Record followed by Get Transcript Online. This process will either produce a Tax Return Transcript if you filed, or a Verification of Non-Filing if you did not file. For Tax Return Transcripts, make sure to request the Tax Return Transcript and **NOT** the Tax Account Transcript. Upon successful completion of the IRS's two-step authentication online the transcript will appear. If at any point you cannot validate your identity you will need to use the Get Transcript by Mail option (select "Tax Return Transcript" option even if requesting Verification of Non-Filing), which will arrive within 10 business days.

Telephone Request (If using for Verification of Non-Filing, still select "Tax Return Transcript" option) – Available from the IRS by calling 1-800-908-9946. Select option 2 to request an IRS Tax Return Transcript and then enter the year you are requesting (2020). You should receive the transcript within 10 business days from the IRS's receipt of the telephone request.

Paper Request – Complete IRS form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Please make sure to complete all sections requested, including box 7 if requesting Verification of Non-filing. Then enter the date 12/31/2020 in section 9, check the signature check box, and sign the form. Mail or fax the form to the address or fax number provided on page 2 of the 4506-T Form. You will generally receive the transcript or Verification of Non-filing within 10 business days from the IRS's receipt of the paper request.

### **Tax Return**

Submit a signed copy of your 2020 Form 1040, along with Schedules 1, 2, and 3 if you were required to file them. Our office reserves the right to request any additional documentation we find necessary to complete your federal verification.

**For the security of your personal data, please submit your completed form and all other requested documents using our secure upload, found here: [go.longwood.edu/uploadfa](https://go.longwood.edu/uploadfa)**