

Your FAFSA has been selected by the U.S. Department of Education for a process called Verification. We must compare the information from your FAFSA with the information on this worksheet and any other required documents. If there are differences, we will make the necessary corrections to your FAFSA or contact you for further information.

Student Information

First Name	M.I.	Last Name	Date of Birth
Street Address (not campus address)			Email Address
City	State	Zip Code	Phone Number

Family Household Information

List all the people in your household. INCLUDE:

- Yourself, and your spouse if married.
- Your or your spouse's children **IF** you or your spouse will provide more than half of the children's support from July 1, 2023 through June 30, 2024, even if a child does not live with you.
- Other people if they now live with you **AND** you or your spouse provides more than half of their support, **AND** will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

WRITE THE NAME OF ALL HOUSEHOLD MEMBERS BELOW, along with their age and relationship to the student. Then, if any of the people listed will be attending college at least half-time in a degree, diploma, or certificate program between July 1, 2023 and June 30, 2024, also write the name of the college they are attending. If you need more space, attach a separate page.

First and Last Name of Each Household Member	Age	Relationship to Student	Name of College (if applicable for household member)	At Least Half Time? Yes / No
		<i>Self</i>	<i>Saint Mary's University of Minnesota</i>	<i>Yes / No</i>

How to Provide Tax Data to the Financial Aid Office

Use one of the following methods to provide your 2021 tax information to the Financial Aid Office. Tax information is **REQUIRED** for the parents, and for the student if the student filed a tax return. Indicate which method(s) were used on the next page.

1. Use the IRS Data Retrieval Tool (IRS-DRT): *preferred method*

If you didn't use the IRS-DRT when the 2023-2024 FAFSA was first submitted, login to the student's processed FAFSA to make corrections. Click on the "Financial Information" tab and answer the questions to determine if you are eligible to use the IRS-DRT. If eligible, enter your FSA ID and click the "Link to IRS" button. You will be asked to input your tax filing status and address to verify your identity. Input your address exactly as it appears on your filed tax return. Once your identity is confirmed, select "Transfer Now" and follow the on-screen instructions to submit the FAFSA update. FAFSA updates should be received by the Financial Aid Office within 2-3 business days.

2. Request a 2021 Tax Return Transcript from the IRS:

A Tax Return Transcript is an official record of the information on your federal tax return. Transcripts can be requested for free online at www.irs.gov under "Get Your Tax Record" or by calling 1-800-908-9946. Be sure to order a tax return transcript, not an account transcript. Transcripts must be requested using the SSN, date of birth, and address for the primary taxpayer (the taxpayer whose name is listed first on the federal tax return).

3. Provide a copy of your entire 2021 Federal Tax Return:

Provide a copy of your complete, signed 2021 Federal Tax Return, including all pages, schedules, forms, and W-2s.

4. Request a Verification of Non-filing letter from the IRS:

If the student or spouse did not file a tax return in 2021, you are required to provide Verification of Non-filing. A Verification of Non-filing letter can be requested for free online at www.irs.gov under "Get Your Tax Record" or by mail using IRS Form 4506-T and checking box 7.

STUDENT Tax Data and Income Information (check one box)

- Check here if the student used method **1**: You used the IRS Data Retrieval Tool to transfer 2021 income information into the FAFSA **and** did not make changes to the FAFSA after the retrieval tool was used. *(Not available if married filing separately.)*
- Check here if the student used method **2**: You have attached a copy of your complete 2021 IRS Tax Return Transcript. **Write the student's name on the top of the transcript.**
- Check here if the student used method **3**: You have attached a signed copy of your entire 2021 Federal Tax Return, including all pages, schedules, forms, and W-2s.
- Check here if the student used method **4**: You did not file and are not required to file a 2021 Federal Tax Return. If you had earned income in 2021, list your employer(s) and any earnings received in 2021 in the table below. **Attach a copy of your W-2 form from each employer.** If the student had no earned income in 2021, write NONE. **You must also submit a Verification of Non-filing letter from the IRS.**

Employer's Name	2021 Amount Earned	W-2 Attached?

***If Married and Filed Separately:* SPOUSE Tax Data and Income Information** (check one box)

- Check here if this section does not apply to you.
- Check here if the spouse used method **2**: You have attached a copy of your complete 2021 IRS Tax Return Transcript. **Write both the student's name and spouse's name on the top of the transcript.**
- Check here if the spouse used method **3**: You have attached a signed copy of your entire 2021 Federal Tax Return, including all pages, schedules, forms, and W-2s.
- Check here if the spouse used method **4**: You did not file and are not required to file a 2021 Federal Tax Return. If you had earned income in 2021, list your employer(s) and any earnings received in 2021 in the table below. **Attach a copy of your W-2 form from each employer.** If the spouse had no earned income in 2021, write NONE. **You must also submit a Verification of Non-filing letter from the IRS.**

Employer's Name	2021 Amount Earned	W-2 Attached?

Sign the Worksheet

Each person signing below certifies that all of the information reported is complete and correct. The student is required to sign; spouse signature is optional.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.

Student Signature REQUIRED

Date

Spouse Signature

Date

Return to: Saint Mary's University of Minnesota, Financial Aid Office, 700 Terrace Heights #5, Winona, MN 55987

Email: financialaid@smumn.edu

Fax: 507-457-6997