

## 2023-2024 VERIFICATION WORKSHEET - INDEPENDENT (V5)

Please read the entire form, complete ALL sections, attach the requested documentation, sign the form, and return to the Office of Financial Aid and Scholarships. Federal regulations require that we complete verification before processing federal financial aid. If there are differences between the information submitted and your Free Application for Federal Student Aid (FAFSA) the school will make the necessary changes. Incomplete worksheets and documentation will cause delays in processing your financial aid. No determination of aid eligibility can be made until all documents are received and reviewed.

### A. Student Information

|                                  |            |      |                    |
|----------------------------------|------------|------|--------------------|
| Last Name                        | First Name | M.I. | @ _____            |
|                                  |            |      | Banner/NMHU ID     |
| Phone Number (include area code) |            |      | NMHU Email Address |

### B. Family Information

Number of Household Members: List below the people in the student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or 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 the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2024.

Number in College: Include in the space below information about any household member who is, or 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, 2023, and June 30, 2024, and 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/University              | Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|---------------------------------|---|
|           |     | <i>Self</i>  | New Mexico Highlands 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: \_\_\_\_\_ Banner/NMHU ID @ \_\_\_\_\_

## STUDENT 2021 INCOME INFORMATION

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 2021 or had a change in marital status after December 31, 2021.

### Verification of 2021 Income Information for Student Tax Filers

**Instructions:** Complete this section if the student and spouse filed or will file a 2021 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 2021 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 2021 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 2021 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 **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules.**

#### **A 2021 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 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return and Transcript(s) or a signed copy of the 2021 income tax return and application schedules must be provided for each. 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules is provided.

- Check here is a **2021 IRS Tax Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.
- Check here is a **2021 IRS Tax Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is will be provided later.

Student's Name: \_\_\_\_\_ Banner/NMHU ID @ \_\_\_\_\_

### Verification of 2021 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2021 income tax return with the IRS.

#### Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2021.
- The student and/or spouse were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

| Employer's Name               | IRS W2 or an Equivalent Document Provided by Employer ? | Annual Amount Earned in 2021 |
|-------------------------------|---|------------------------------|
|                               |   | \$                           |
|                               |   | \$                           |
|                               |   | \$                           |
| Total Income Earned from Work |   | \$                           |

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

- Check here if confirmation of non-filing or a signed statement is provided.
- Check here if confirmation of non-filing or a signed statement will be provided later

### C. Identity and Statement of Educational Purpose

#### **IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (To Be Signed at the Institution)**

The student must appear in person at New Mexico Highlands 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.**

New Mexico Highlands University 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 Educational Purpose provided below.

#### **Identity and Statement of Educational Purpose (To Be Signed in the Presence of a Notary when unable to be signed at Institution)**

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

Student's Name: \_\_\_\_\_ Banner/NMHU ID @ \_\_\_\_\_

- (a) 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
- (b) 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 Educational 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  
(Print Student's Name)

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

\_\_\_\_\_ for 2023–2024.

(Name of Postsecondary Educational Institution)

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

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

### Notary's Certificate of Acknowledgement

State of \_\_\_\_\_ City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_,

(Notary's name)

personally appeared, \_\_\_\_\_, and proved to me on the basis of  
(Printed name of signer)

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 \_\_\_\_\_

Student's Name: \_\_\_\_\_ Banner/NMHU ID @ \_\_\_\_\_

**D. Certifications and Signatures**

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

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

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

@ \_\_\_\_\_  
Banner/NMHU ID

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date