

## 2023-2024 INDEPENDENT VERIFICATION WORKSHEET

You have been selected for verification by the Department of Education. Please note that 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.ed.gov](https://fafsa.ed.gov). In most cases, no further documentation is needed to verify **2021 IRS income tax return** information that was transferred into the student's FAFSA using the IRS DRT, if that information was not changed.

In most cases, for electronic filers, 2021 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2021 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the 2021 IRS income tax return information is available for the IRS DRT within 8–12 weeks after the 2021 paper IRS income tax return has been received by the IRS. If you are not able to use the IRS DRT, you can request a tax return transcript from the IRS.

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. The 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.

### I. Student Information:

@ \_\_\_\_\_  
Student's ID Number (if known)

\_\_\_\_\_  
Student's Last Name

\_\_\_\_\_  
Student's First Name

\_\_\_\_\_  
M.I.

\_\_\_\_\_  
Last 4 digits of Student's SSN

\_\_\_\_\_  
Student's Date of Birth

\_\_\_\_\_  
Student's Email Address


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

\_\_\_\_\_  
Student's Last Name

\_\_\_\_\_  
Student's First Name


\_\_\_\_\_  
M.I.


**II. Number of Household Members and Number in College:  
Complete Section A then Section B.**

 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.

**AND**

**B. 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.

**DO NOT LEAVE THIS SECTION BLANK.**

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	HPU	

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 Last Name

\_\_\_\_\_  
Student's First Name

\_\_\_\_\_  
M.I.

### III. Student Tax Information

**DO NOT COMPLETE BOTH SECTIONS. Only complete Section A OR B.**

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

#### A. Student 2021 Tax Filers (Non-filers skip to Section B)

**Instructions:** Only complete this section if the student and spouse filed or will file a 2021 IRS income tax return. *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.* 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 or plans to use the IRS DRT in *FAFSA on the Web* 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 school with a **2021 IRS Tax Return Transcript(s) or signed copy of the 2021 income tax return and applicable schedules.**
- The student has filed a foreign tax form or tax return with Puerto Rico, another US Territory, or Freely Associated State and has attached a copy of this form.
- The student and their spouse filed separate 2021 IRS income tax returns. The IRS DRT cannot be used and the student will provide **2021 IRS Tax Return Transcripts or a signed copy of the 2021 income tax return and applicable schedule** for each person.

-----OR-----

#### B. Student Non-Tax Filers

**Instructions:** 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. Students must also provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

**Check the box that applies:**

- The student and/or spouse were not employed and had no income earned from work in 2021.
- The student and/or spouse were employed 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 W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

#### **IV. Certifications and Signatures**

Each person signing below **certifies** that all of the information reported is complete and correct. The student must **hand sign in ink** and date.

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

**(Electronic Signatures will not be accepted)**

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

@\_\_\_\_\_  
Student's ID Number

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

\_\_\_\_\_  
Date

Submit in Person: **Hawai'i Pacific University Financial Aid Office**  
500 Ala Moana Blvd, Suite 5A  
Honolulu, Hawai'i 96813

Submit by Email: [financialaid@hpu.edu](mailto:financialaid@hpu.edu)

Submit by FAX: (808) 544-0884