



**University of South Carolina Beaufort**  
 Financial Aid/Veterans Affairs Office  
 801 Carteret Street, Beaufort, SC 29902  
**Office:** 843-521-3104 **Fax:** 843-521-3194 [www.uscb.edu](http://www.uscb.edu)  
**Email:** [uscbfina@uscb.edu](mailto:uscbfina@uscb.edu)

## 2023–2024 INDEPENDENT VERIFICATION WORKSHEET

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) has been selected for a review process called **verification**. Verification must be completed before federal financial aid can be awarded. Federal financial aid will be awarded upon completion of the entire verification process. Please complete and sign this form, attach any required documents, and submit it to the address, fax, or email above. **Blank or incomplete forms will not be processed.** If you have questions about the process, you can contact our office.

**Important Note: Detailed instructions for the Verification of IRS Tax Data and Income Information are listed on Page 3 of this document. Please refer to these instructions when completing Section C.**

For your protection, please remove all personally identifiable information (PII) such as: SSN, date of birth, and driver’s license number from your documents prior to submitting them. Also, please include the student’s name and VIP ID on all documents.

### SECTION A: Student Information

Last Name	First Name	Middle Name	Student VIP ID
Email Address	Cell or Alternate Phone Number		

### SECTION B: Household Information

List the people in your household, including:

- yourself (and your spouse, if married),
- your children if you will provide more than half of their support between July 1, 2023 and June 30, 2024, even if they do not live with you, and
- other people if they now live with you, and you provide more than half of their support, and will continue to provide more than half of their support between July 1, 2022 and June 30, 2023.

Write the names of all household members in the space below. Write in the name of the college for any household member who will be attending college at least half-time between July 1, 2023 and June 30, 2024 and will be enrolled in a program that leads to a college degree, certificate, or diploma at a postsecondary educational institution. Attach a separate sheet if needed.

Full Name	Age	Relationship	College
		Self	USC Beaufort

**Section C: Student/Spouse Tax Forms and Income Information**

I/we are attaching all student/spouse (if applicable) 2021 W-2s

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1. **STUDENT/SPOUSE TAX FILERS:** You must check at least one of the following. Please refer to instructions listed on Page 3.
- I used the IRS Data Retrieval Tool to transfer my 2021 tax data to the FAFSA
  - I am attaching a **signed** copy of my 2021 Federal Tax Return (1040)
  - I am attaching my 2021 IRS Tax Return Transcript
  - I am attaching a **signed** copy of my 2021 amended tax return -1040-X (if applicable)
  - I am active duty military, and have submitted the December 2021 Leave and Earnings Statement (LES)
2. **STUDENT NON-TAX FILERS:** *Federal guidelines require students (and their spouses if married) to obtain an IRS Verification of Non-filing Letter dated on or after October 1, 2022 if they did not file a 2021 federal tax return.*
- I am attaching an **IRS Verification of Non-filing Letter** dated on or after Oct 1, 2022
  - I attempted to obtain the Verification of Non-filing Letter and was not able to obtain the required documentation from the IRS. List the date attempted: \_\_\_\_\_
- Complete the section below and attach a copy of the W-2 form for each source of employment. Misplaced W-2s must be requested from your employer(s) or the IRS.

Sign here to certify that you **DID NOT** and **ARE NOT** required to file a 2021 U.S. Federal Tax Return:

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

3. **STUDENT'S SPOUSE NON-TAX FILER:** *Federal guidelines require students (and their spouses if married) to obtain an IRS Verification of Non-filing Letter dated on or after October 1, 2022 if they did not file a 2021 federal tax return.*
- I, the student's spouse, am attaching an IRS Verification of Non-filing Letter dated on or after Oct 1, 2022
  - I, the student's spouse, attempted to obtain the Verification of Non-filing Letter and was not able to obtain the required documentation from the IRS. List the date attempted: \_\_\_\_\_
- Complete the section below and attach a copy of the W-2 form for each source of employment. Misplaced W-2s must be requested from your employer(s) or the IRS.

Sign here to certify that you **DID NOT** and **ARE NOT** required to file a 2021 U.S. Federal Tax Return:

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Spouse's Signature (Required if a non-tax filer) \_\_\_\_\_ Date \_\_\_\_\_

4. **STUDENT TAX FILERS & NON-TAX FILERS:**  
**All students (and their spouses if married) are required to submit copies of all 2021 W-2(s) along with the rest of the required documentation.**

**SECTION D: Certification and Signatures**

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Each person signing this worksheet certifies that all the information reported is true and accurate.  
**Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

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Student's Signature \_\_\_\_\_ Date \_\_\_\_\_ Spouse's Signature (optional) \_\_\_\_\_ Date \_\_\_\_\_

## Instructions for the Verification of Tax Return Data and Income Information:

1. **TAX FILERS:** *Federal guidelines require students (and their spouses if married) to verify their 2021 Federal Tax Return Data using one of the following methods:*

**Using the Data Retrieval Tool:** The best way to verify tax return data is by using the IRS Data Retrieval Tool that is part of the FAFSA on the Web. Please be aware that you will not be able to see the tax data that is being imported into the FAFSA, but this is the fastest and easiest method to use. If you have not already used the tool, go to [FAFSA.gov](https://www.fafsa.gov), log into the FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you (and your spouse if married) are eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into the FAFSA.

**OR**

**Ordering a 2021 Tax Return Transcript:** You (and your spouse if married) may order a 2021 IRS tax return transcript online at: [www.irs.gov](https://www.irs.gov). Click on "Get Transcript Online" or "Get Transcript by Mail", call 1-800-908-9946, or mail the paper Form 4506TEZ or 4506T. Be sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when your 2021 IRS tax return was filed). If you are married and you filed separate 2021 tax returns, 2021 IRS tax return transcripts must be submitted for you and your spouse. Submit the 2021 IRS tax transcript(s) to the Financial Aid Office.

**OR**

**Submitting a Signed Copy of the Filed 2021 Federal Tax Return:** You (and your spouse if married) may submit a signed copy of your filed 2021 federal tax return to the Financial Aid Office. Include pages one and two of your return (and your spouse's return if married and filed separately). Also include copies of Schedule(s) 1, 2, 3, C and K, if filed..

2. **AMENDED TAX FILERS:** *Federal guidelines require students (and their spouses if married) who filed amended 2021 Federal Tax Returns to use one of the methods listed above and submit a signed copy of their Amended Tax Return (1040X) to the Financial Aid Office.*
3. **NON-TAX FILERS:** *Federal guidelines require independent students (and their spouse if married) to obtain an IRS Verification of Non-filing Letter dated on or after October 1, 2022 if they did not file a 2021 Federal Tax Return.* You may request the Verification of Non-filing Letter using the IRS "Get Transcript Online" tool or by submitting IRS Form 4506-T and checking box 7. In addition, each non-filer must: sign the TAX NON-FILER statement on this form, list all sources of 2021 income earned from work, list amount of income received from each source, and submit copies of all 2021 W-2 forms.  
(See Section C)

4. **ALL TAX FILERS AND NON-TAX FILERS:**

***All students (and their spouses if married) are required to submit copies of all 2021 W-2(s) along with the rest of the required documentation. If you are in the military, please submit the December 2021 Leave and Earnings Statement (LES).***

**CHECKLIST (please review to ensure you have all documents necessary for the verification to be completed in a timely manner)**

- Student 2021 W-2s, 2021 tax information.
- Spouse's 2021 W-2s, 2021 tax information (if married)
- Copies of Schedule(s) 1, 2, 3, C, and K if applicable
- Copy of the December 2021 LES if applicable
- All sections are complete (Sections A, B, C, D, & E).
- All necessary signatures are provided.