



**Student Financial Assistance**  
 G-1 Parker Hall, 300 W. 13th Street  
 Rolla, MO 65409  
 P: 573/341-4282 F: 573/341-4274

**2023-2024 Financial Aid Year  
 Independent Verification Worksheet**

Your FAFSA was selected by the U.S. Department of Education for review in a process called "Verification." In this process Missouri S&T is required to compare information from your FAFSA with the information on this worksheet and with any other required documents. The law states we have the right to ask you for this information and review it for accuracy under the financial aid program rules (34 CFR, Part 668). **Verification must be completed before your financial aid will be credited to your student account.**

**INSTRUCTIONS**

1. Complete all sections of this worksheet in **full**. **Incomplete forms will be returned.**
2. Student (and your spouse, if married) must use their 2021 Federal Income Tax for the 2023-2024 academic year. The easiest way to provide this information is to use the IRS Data Retrieval Tool (DRT) to transfer your 2021 tax information to your 2023-2024 FAFSA, if you have not already. **See instructions attached or go to:** [sfa.mst.edu/resources/forms/](https://sfa.mst.edu/resources/forms/)
3. All documents must be submitted by the following deadlines:  
 Fall 2023 Enrollment: October 31, 2023  
 Spring 2024 Enrollment: March 1, 2024
4. Please return all documents requested to our office via fax to (573)341-4274, secure document upload in [Joe'SS](#) or mail to G-1 Parker Hall, 300 W 13th St., Rolla, MO 65409-0250.

**Student Information**

|  |               |                          |
|--|---------------|--------------------------|
| Last Name                                | First Name    | M.I.                     |
| Daytime Phone number (include area code) | Date of Birth | Missouri S&T Student ID# |

**Family Information**

| Full Name   | Relationship  |              |              |
|---|---|--------------|--------------|
| Write the names of the people in your household in the chart below:<br>1. Include <b>yourself</b> as the student.<br>2. Include <b>your spouse</b> if you are married<br>3. Include you 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 the child does not live with you.<br>4. Include <b>other dependents</b> if they now live with your household and you will continue to provide <i>more than half</i> of their support through June 30, 2024. | Write the relationship of each family member to the student in the chart below.   |              |              |
|   | College   |              |              |
|   | Add the name of the college for any household member (excluding parents) who will be enrolled in a degree, diploma, or certificate program at an eligible postsecondary educational institution at least half-time at any time between July 1, 2023, through June 30, 2024. |              |              |
| Age   |   |              |              |
| Write the age of each family member in the chart below  |   |              |              |
| Full Name   | Age   | Relationship | College      |
|   |   | Self/Student | Missouri S&T |
|   |   |              |              |
|   |   |              |              |
|   |   |              |              |

\* If more space is required, attach a separate page.

## Student's (and spouse, if married) Information

### Check only on box below regarding STUDENT information

- a.  I (and spouse) filed a 2021 Federal Tax Return and used the IRS DRT when completing the FAFSA.
- b.  I (and spouse) filed a 2021 Federal Tax Return and will provide a Federal Tax Return Transcript from the IRS or a signed copy of the 2021 income tax return and applicable schedules.
- c.  \*I (and spouse) was not employed, did not have income, and am not required to file a 2021 Federal IRS Tax Return.
- d.  \*I (and spouse) was employed and had income but am not required to file a 2021 Federal Tax Return.

**\*COMPLETE ONLY IF BOX C or D ABOVE IS CHECKED:** Students (and spouse) who did not file a 2021 Federal Tax Return are required to submit a Verification of Non-Filing Letter from the IRS and ALL W-2(s) for 2021 from all employers. List all 2021 employers and related earnings below.

| Name of Employer | Amount Earned in 2021 |
|------------------|-----------------------|
|                  |                       |
|                  |                       |
|                  |                       |
|                  |                       |

If more space is required, attach a separate page.

Signature Required of Non-Tax Filer \_\_\_\_\_

Signature Required of Non-Tax Filer (Spouse) \_\_\_\_\_

### Sign this worksheet by hand or with stylus. Typed or digital signatures will be returned.

Each person signing certifies that all the information reported is complete and correct. The student must manually sign this worksheet. (If married, the spouse's signature is optional.)

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date

\_\_\_\_\_  
Daytime Phone number (include area code)

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

**Return form to Student Financial Assistance**

**In-person/mail: G-1 Parker Hall  
300 West 13th Street  
Rolla, MO 65409-0250**

**Fax: 573.341.4274**

**Submit in [Joe'SS](#): Secure Document Upload (QR Code provided)**



## DATA RETRIEVAL INSTRUCTIONS

Students and parents who are eligible to use the IRS Data Retrieval Tool (IRS DRT) can access it from within the Free Application for Federal Student Aid (FAFSA) on the student or parent finances pages:

- Click **Link To IRS**. (**Note:** If you have already used the IRS DRT to transfer your tax return information into your application, click the “View option to link to the IRS” hyperlink.)
- Enter your FSA ID. (**Note:** The person whose tax information is being transferred should enter his or her own FSA ID. Students will not be asked to enter their FSA ID if they entered an FSA ID to begin their FAFSA.)
- Your FAFSA will be saved, and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information exactly as it appears on your tax return. If you get an error that there’s no match, double check your information, including the exact mailing address on your return.
- Once authenticated with the IRS, you will be provided with information surrounding your IRS tax information. You can either transfer your information from the IRS or choose to return to FAFSA on the Web.

If you use the IRS DRT to transfer your tax return information from the IRS, the information will not display on your FAFSA. For your protection, the answer to each question is replaced with “Transferred from the IRS.”

### Tax Return Transcript AND Verification of Non-Filing from the IRS

|  |  |
|--|--|
| <p style="text-align: center;"><b>Verification of Non-Filing</b></p> <p>A non-filer is any Student or Parent (not filing a joint return) who did not work or did work but did not file a <b>2021</b> Federal Income Tax Return. For the 2023-2024 academic year any parent or independent student who is a Non- Filer is required to provide a Verification of Non-Filing Letter from the IRS and all <b>2021</b> W2(s) from each employer. A request to the IRS for a Verification of Non-Filing Letter can be made using the IRS “Get Transcript Online” tool at <a href="http://www.irs.gov/Individuals/Get-Transcript">www.irs.gov/Individuals/Get-Transcript</a> or by submitting IRS Form 4506-T and checking box 7.</p> | <p style="text-align: center;"><b>ONLINE</b></p> <ul style="list-style-type: none"> <li>• Go to <a href="http://www.irs.gov">www.irs.gov</a></li> <li>• Select <b>Get Your Tax Record</b> - You will have 2 options</li> <li>• Click “Get Transcript Online”</li> <li>• Log In OR Sign Up for an account</li> <li>• Select a reason you need a transcript: <b>Higher Education/Student Aid</b></li> <li>• Click “GO”</li> <li>• Select the year of the <b>Return Transcript</b> needed: <b>2021</b></li> <li>• Your transcript is ready to download!</li> <li>• Click “Get Transcript by Mail”</li> <li>• Enter Social Security Number, Date of Birth, Street Address, Zip Code. Select Continue</li> <li>• Type of Transcript = <b>Return Transcript</b></li> <li>• For Tax Year = <b>2021</b></li> <li>• Click on Submit (Your transcript will arrive within 10 business days.)</li> </ul> |
| <p style="text-align: center;"><b>BY PHONE</b></p> <ul style="list-style-type: none"> <li>• Call the IRS at 1-800-908-9946</li> <li>• Enter your social security number</li> <li>• Enter street address numbers</li> <li>• Option 2 (Tax Transcript)</li> <li>• Enter year: <b>2021</b></li> <li>• <b>No Customer File Number needed</b></li> </ul> <p>Your transcript will arrive within 10 business days.</p>  | <p style="text-align: center;"><b>BY MAIL</b></p> <ul style="list-style-type: none"> <li>• Complete Form 4506-T or Form 4506T-EZ</li> <li>• Both forms are available online at <a href="http://www.irs.gov/individuals/get-transcript">www.irs.gov/individuals/get-transcript</a></li> <li>• Mail to the address indicated on the form</li> </ul>  |