

# Verification Instructions

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called “Verification” (CFR Title 34, Part 668). The law says that before awarding Federal Student Aid, your school must confirm the information you and your parents reported on your FAFSA. Your school will be comparing information from your application with copies of you and your parent’s 2021 IRS Tax Return Transcripts, or 2021 Federal Income Tax Return [Form 1040, 1040A or 1040EZ] or with W-2 forms or other financial documents. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the Financial Aid Office at your school. The law says that your school has the right to ask you for this information before awarding financial aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically. If you have questions about verification, contact the school’s Financial Aid Office as soon as possible so that processing will not be delayed. **Please Note: Any verification documents with missing or incomplete information cannot be processed. An e-mail will be sent to the address listed on your FAFSA regarding additional information needed.**

## **WHAT YOU NEED TO DO:**

Go to [www.klamathcc.edu](http://www.klamathcc.edu), my KCC, Financial Aid Status, 2023/2024 “What is Needed to Complete Application Processing/Message Board.” Based on the type of verification you were chosen for, you might be required to submit one or more of the following:

- A completed, signed and dated **Verification Worksheet**.
- Federal tax return filers: 2021 IRS Tax Return Transcript(s) or 2020 Federal Income Tax Return [Form 1040, 1040A or 1040EZ] unless your data comes directly from the IRS Data Retrieval Tool. KCC strongly recommends that you use the **IRS Data Retrieval Tool** when possible.
- Non-tax return filers: Copies of all 2021 W-2’s for Income Earned from Work and 1099G for Unemployment benefits that were taxed.
- High School Verification form (follow instructions on the form)
- Identity/Statement of Education Purpose form (follow instructions on the form)
- Verification of Untaxed Income form (follow instructions on the form)
- Additional Income Information for Verification form (follow instructions of the form)

## **WHAT YOU NEED TO KNOW:**

If IRS Tax Return Transcript(s) are required and you are unable to use the IRS Data Retrieval Tool and you are

**>> a Dependent Student**, we need:

- Your IRS Tax Return Transcript or signed tax return.
- Your parent(s) IRS Tax Return Transcript(s) or signed tax return – If, at the time the 2023/2024 FAFSA was signed, the parent who signed it was: Married or living with your biological/adoptive parent, regardless of gender – Submit Parent 1 (father/mother/stepparent’s) and Parent 2 (father/mother/stepparent’s) joint IRS Tax Return Transcript or both of their separate IRS Tax Return Transcripts. Separated, Divorced, or Widowed – Submit that parent’s IRS Tax Return Transcript. (Note: If a joint return was filed, W-2’s and 1099’s is also required so income can be separated.)

**>> an Independent Student**, we need:

- Yours – If separated/divorced/widowed when the 2023/2024 FAFSA was signed and you filed a joint return, submit a copy of the joint IRS Tax Return Transcript with all W-2’s and 1099’s
- Spouse – If married when the 2023/2024 FAFSA was signed, submit your joint IRS Tax Return Transcript or both separate IRS Tax Return Transcripts.

Your options for obtaining a free IRS tax return transcript are:

- AT [www.irs.gov](http://www.irs.gov) click on “Get Transcript of Your Tax Records.” You have two options: Get Transcript ONLINE or Get Transcript by MAIL. Make sure to request “Tax Return” and **not** “Tax Account.” If ordering by mail, allow 5-10 business days for them to be mailed to your exact address of record. The IRS will only allow you to request one return transcript by mail so keep your originals.
- If moved since filed, use form 4506-T from [www.irs.gov](http://www.irs.gov).

If you amended your return, provide both of the following:

- A signed copy of a **2021 IRS Tax Return Transcript or the original 2021 IRS income tax return that was filed with the IRS**; AND
- A signed copy of the 2021 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft:

- A victim of IRS identity theft who is not able to obtain a **2021 Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer’s identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer’s 2021 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns:

- An individual filed or will file a 2021 income tax return with Puerto Rico, another U.S. territory (for example, Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2021 income tax return(s).

If you are asked to verify Household Size on the **Verification Worksheet** and you are:

>> **A Dependent Student**, include in your parent(s) household. \*

- Yourself,
- Your parents, even if you don’t live with your parents,
- Your parent’s other children if:
  - Your parents will provide more than half of their support from 7/1/23 through 6/30/24, or
  - The children could answer “no” to every question in Step Three of the FAFSA, and
- Other people if they now live with your parents, your parents provide more than half of their support and your parents will continue to provide more than half of their support from 7/1/23 through 6/30/24.
- The number in college should be those in your parent’s household who will be at last half time in a program of study that leads to a college degree or certificate. **Always count yourself – DO NOT include your parents.**

*\*Parent’s Household: If your legal parents (biological and/or adoptive) are living together (married or not), include both, regardless of their gender. If your parent is widowed or single, include that parent. If your widowed parent is remarried as of today, include that parent and your stepparent. If your parents are divorced or separated, include the parent you lived with more during the past 12 months. If you did not live with one parent more than the other, include the parent who provided more financial support during the past 12 months or during the most recent year that you received support from a parent. If this parent was remarried as of the date you signed the FAFSA, include that parent and your stepparent. (Grandparents, aunts and uncles are not considered parents unless they have legally adopted you).*

>> **an Independent Student**, include in your household:

- Yourself
- Your spouse
- Your children, if you will provide more than half of their support from 7/1/23 through 6/30/24, and
- Other people if they now live with you and you provide more than half of their support and you will continue to provide more than half of their support from 7/1/23 through 6/30/24.
- The number in college should be those in your household who will be attending college at least half-time in a program of study that leads to a college degree or certificate. **ALWAYS COUNT YOURSELF.**

Submit all items requested and direct any financial aid questions as follows:

Mailing Address:

Klamath Community College  
Financial Aid Office  
7390 South 6<sup>th</sup> Street  
Klamath Falls, OR 97603

Telephone: (541) 880-2352

Fax: (541) 880-2250

Email: [FinAid@klamathcc.edu](mailto:FinAid@klamathcc.edu)

# 2023-2024 Verification Worksheet

## Independent Student

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called “Verification” (CFR Title 34, Part 668). The law says that before awarding Federal Student Aid, your school must confirm the information you and your spouse (if applicable) reported on your FAFSA. Your school will be comparing information from your application with copies of you and your spouse’s (if you are married) 2021 IRS Tax Return Transcripts, or 2021 Federal Income Tax Return [Form 1040, 1040A or 1040EZ] or with W-2 forms or other financial documents. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the Financial Aid Office at your school. The law says that your school has the right to ask you for this information before awarding financial aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically. If you have questions about verification, contact the school’s Financial Aid Office as soon as possible so that processing will not be delayed. **Please Note: Any verification documents with missing or incomplete information cannot be processed. An e-mail will be sent to the address listed on your FAFSA regarding additional information needed.**

### A. Independent Student’s Information

Student’s Last Name	Student’s First Name	Student’s M.I.	Student’s Social Security Number
Student’s Street Address (include apt. no.)			Student’s Date of Birth
City	State	Zip Code	Student’s Email Address
Student’s Home Phone Number (include area code)			Student ID #

### B. Independent Student’s Family Information

List below the people in your household. You must include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if they do not live with you.
- 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 through June 30, 2024.

Also include the name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023, and June 30, 2024. *If more space is needed, attach a separate page with your name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
Missy Jones (example)	18	Sister	Central University	Yes
		Self	Klamath Community College	

### C. Select Tax Filing Status

*For both the student and spouse (if married), check the box that applies:*

#### Student (and Spouse if married)

- ☐ Filed or will file federal taxes (complete section D)
- ☐ I am Not required to file federal taxes (complete section F)

### D. If you were required to file a U.S. Federal Tax Return

**Instructions:** You must either use the IRS Data Retrieval Tool within your FASFA, or attach a copy of your 2021 Tax Transcript in a signed copy of your 2021 tax return that was submitted to the IRS to these documents.

To obtain a 2021 IRS Tax Return Transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" as no other form of transcript (i.e. account, etc.) will be acceptable. Use the Social Security Number and date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return).

*Please Note: In most cases, for electronic filers, a 2021 IRS Tax Return Transcript may be requested from the IRS within 2-3 weeks after the 2021 IRS income tax return has been accepted by the IRS.*

#### 1. STUDENT TAX RETURN FILERS—

**Important Note:** If the student filed, or will file, an amended 2021 IRS tax return, the student must contact the Financial Aid office before completing this section.

Check the box that applies:

- ☐ The student has used the IRS Data Retrieval Tool. **Date the tool was used:** \_\_\_\_\_. *Please verify the data has been transferred successfully before turning in this form.*
- ☐ The student has attached to this form a **2021 IRS tax return transcript of a signed copy of their 2021 tax return.** *To obtain an IRS tax return transcript see instructions above.*

**Note:** Please be aware that if the student and spouse did not file *Married Filing Jointly*, a separate IRS Tax Return Transcript **for the spouse** must be attached to the verification packet. If the spouse was not required to file a 2021 Tax Return but worked in 2021, the spouse must complete Section E, Part 2 and attach **all W-2s**. If the spouse did not work, they must submit a "Verification of Nonfiling" from the IRS.

### E. Supplemental Nutrition Assistance Program (SNAP)

In 2021, did you or your spouse receive food stamp benefits?

Yes, I or my parents received food stamp benefits in 2021.

No, I did not receive food stamp benefits in 2021.

**Note: If KCC has reason to believe that this information is inaccurate, KCC may require documentation from the agency that issued the benefits.**

**F. If you were not required to file a U.S. Federal Tax Return**

*If you worked in 2021 (but were not required to file), you must also list each of your employers on the spaces provided below and provide a copy of your W-2.*

**1. STUDENT**

Check the box that applies:

- ☐ The student was not employed and had no income earned from work in 2021.
- ☐ The student was employed in 2021 and has listed below the names of all employers; the amount earned from each employer in 2021, **and has provided copies of all 2021 IRS W-2 forms issued by their employers.** List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

**2. SPOUSE (if married)**

Check the box that applies:

- ☐ The spouse was not employed and had no income earned from work in 2021.
- ☐ The spouse (if married) was employed in 2021 and has listed below the names of all employers; the amount earned from each employer in 2021, **and has provided copies of all 2021 IRS W-2 forms issued by their employers.** List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

**G. CHILD SUPPORT PAID**

Did you or your parent(s) **pay child support** because of divorce, separation or a legal requirement?

Yes

No

If yes, please indicate the name of the person who paid the child support, the name of the person to whom child support was paid, the name of the child and the total amount of support paid in 2021 for that child.

Name of person that paid the support	Name of person that received the support	Name of child	Total 2021 amount paid
			\$
			\$
			\$
			\$

**Note:** If KCC has reason to believe that this information is inaccurate, KCC may require documentation from the agency that issued the benefits.

Student FAFSA (Q43)	Additional Financial Information and Untaxed Income Calendar Year 2021
\$	Education credits from IRS Form 1040 - line 50 or 1040A - line 33.
\$	Child support you <b>paid</b> because of divorce or separation or because of a legal requirement. <i>Don't include support for children in your (or your parents') household.</i> Amounts will be found from your own records.
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and other qualified plans from IRS Form 1040 - line 28 + line 32 or 1040 A - line 17.
\$	Tax exempt interest from IRS Form 1040 - line 8b or 1040A - line 8b.
\$	Untaxed portions of IRA distributions from IRS Form 1040 - lines (15a minus 15b) or 1040A - lines (11a minus 11b). <i>Exclude rollovers. If negative, enter a zero here.</i>
\$	Untaxed portions of pensions and annuities from IRS Form 1040 - lines (16a minus 16b) or 1040A lines (12a minus 12b). <i>Exclude rollovers. If negative, enter a zero here.</i>
\$	<b>**There must be an amount on every line. If you filed a 1040EZ all untaxed information will be zero – only amount would be if child support was paid**</b>

**Important Next Steps:**

Once your verification worksheet is submitted and ALL required documentation has been received by the Financial Aid Office, your application will be considered complete. The processing time for a completed application is **2-3 weeks**.

If there are differences between your application information and your financial documents, the Financial Aid Office will make corrections to your FAFSA electronically or contact you to make the corrections.

Once your application has been processed, you will receive information concerning your next steps in the process via mail.

**Certification and Signatures**

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

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

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

*Do not mail this worksheet to the U.S. Department of Education.  
Submit this worksheet to the financial aid administrator at your school.  
You should make a copy of this worksheet for your records.*