V-5 Independent Verification Worksheet
2021 – 2022

Student Name: ________________________________       Student A#: ________________________

Date of Birth: ________________________________       Phone Number: ________________________
E-mail Address: ________________________________

SECTION 1: HOUSEHOLD INFORMATION

Household Members: Read the following to determine what information you must provide in the boxes below. Persons do not necessarily have to have been claimed on taxes to be considered a part of the household.

- If you are married and not separated, you must report information for your spouse, your children, and any household members that live with you if you will provide more than half of their support between July 1, 2021 and June 30, 2022.
- If you are not married, you must report information for your children and any household members that live with you if you will provide more than half of their support between July 1, 2021 and June 30, 2022.
- If you are divorced, separated, or widowed, you must report information for your children and any household members that live with you if you will provide more than half of their support between July 1, 2021 and June 30, 2022.
- If more space is needed for additional household members, please attach a separate page.

<table>
<thead>
<tr>
<th>Spouse Name:</th>
<th>1. Full Name:</th>
<th>2. Full Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age:</td>
<td>Age:</td>
<td>Age:</td>
</tr>
<tr>
<td>Is this person enrolled in college?</td>
<td>Is this person enrolled in college?</td>
<td>Is this person enrolled in college?</td>
</tr>
<tr>
<td>□ Yes □ No</td>
<td>□ Yes □ No</td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>If this person is enrolled in college, are they enrolled at least half-time?</td>
<td>If this person is enrolled in college, are they enrolled at least half-time?</td>
<td>If this person is enrolled in college, are they enrolled at least half-time?</td>
</tr>
<tr>
<td>□ Yes □ No/NA</td>
<td>□ Yes □ No/NA</td>
<td>□ Yes □ No/NA</td>
</tr>
<tr>
<td>College:</td>
<td>College:</td>
<td>College:</td>
</tr>
<tr>
<td>School Code:</td>
<td>School Code:</td>
<td>School Code:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Full Name:</th>
<th>4. Full Name:</th>
<th>5. Full Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age:</td>
<td>Age:</td>
<td>Age:</td>
</tr>
<tr>
<td>Relationship to student:</td>
<td>Relationship to student:</td>
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</tr>
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SECTION 2: TAX FILING STATUS

**STUDENT (and spouse if filed jointly), select one of the following:**

- **A.** I have already used the IRS Data Retrieval Tool (DRT) on the FAFSA to transfer 2019 IRS income tax return information onto the FAFSA.

- **B.** I am providing my official 2019 IRS Tax Return Transcript.

- **C.** I am providing a SIGNED copy of my 2019 IRS Form 1040 and all applicable schedules, which may include Schedule 1, Schedule 2, Schedule 3, Schedule C, and/or Schedule K. One or more schedules may not be applicable but must be provided if available.

- **D.** I amended my 2019 taxes. I am providing the tax documentation listed in option B or C above and a SIGNED copy of my 2019 IRS Form 1040X that was filed with the IRS.

- **E.** I was employed in 2019 and was not required to file a 2019 Federal Tax Return. I have listed all employers and wages earned in the spaces provided below, even if the employer(s) did not issue a W2. This includes wages not reported to the IRS. I have attached all 2019 W2s and a verification of non-filing (VNF) letter from the IRS dated on or after October 1st, 2020. *(To obtain non-filing documentation, use IRS Form 4506-T, option 7.)*

  Employer Name(s):
  Wages Earned:

  Employer Name(s):
  Wages Earned:

  F. I was not employed in 2019 and was not required to file a 2019 Federal Tax Return. I have attached a verification of non-filing (VNF) letter from the IRS dated on or after October 1st, 2020. *(To obtain non-filing documentation, use IRS Form 4506-T, option 7)* or fill out the **Zero Income Verification Form.**

**SPOUSE (if filed separately), select one of the following:**

- **A.** I have already used the IRS Data Retrieval Tool (DRT) on the FAFSA to transfer 2019 IRS income tax return information onto the FAFSA.

- **B.** I am providing my official 2019 IRS Tax Return Transcript.

- **C.** I am providing a SIGNED copy of my 2019 IRS Form 1040 and all applicable schedules, which may include Schedule 1, Schedule 2, Schedule 3, Schedule C, and/or Schedule K. One or more schedules may not be applicable but must be provided if available.

- **D.** I amended my 2019 taxes. I am providing the tax documentation listed in option B or C above and a SIGNED copy of my 2019 IRS Form 1040X that was filed with the IRS.

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Answer the following questions. If your answer for any of the questions is “Yes,” provide a copy of your 1099-R.

1. STUDENT, if your 2019 1040 lists an amount for IRAs, pensions, and annuities (line 4a and/or 4c), is this a ROLLOVER amount?
   ☐ Yes ☐ No/NA

2. SPOUSE (if filed separately), if your 2019 1040 lists an amount for IRAs, pensions, and annuities (line 4a and/or 4c), is this a ROLLOVER amount?
   ☐ Yes ☐ No/NA

Select and provide one of the following documents that will indicate the student's high school completion status when the student begins college in 2021-2022:

☐ A copy of the student's high school diploma
☐ A copy of the student’s final official high school transcript that shows the date when the diploma was awarded
☐ A state certificate or transcript received by a student after the student passed a State-authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma
☐ For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document
☐ An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree
☐ For a homeschooled student in a state where state law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential
☐ For a homeschooled student in a state where state law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting

SECTION 5:

By signing this worksheet, I certify that I have read through ALL information and ALL instructions on this form and have followed instructions to the best of my ability. I further certify that all information reported on this worksheet is complete and correct, and understand that verification will not be processed if any section has been left blank.

Signing for someone else is fraud, even with their permission.

ELECTRONIC SIGNATURES ARE NOT ACCEPTED.

Student Signature (required): ________________________________ Date: ________________________________

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Identity and Statement of Educational Purpose (To Be Signed at the Institution)
The student must appear in person at the WV State University to verify his or her identity by presenting a valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution 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)
If the student is unable to appear in person at the WV State University to verify his or her identity, the student must provide:
(a) A copy of the 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, which is provided below and 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.

I certify that I (Print Student's Name),______________________, am the individual signing 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 the WV State University for 2021-2022.

Student Signature:_________________________________ Date: ____________

Received by FA Personnel only:____________________ Date: ____________

NOTARY’S CERTIFICATION OF ACKNOWLEDGEMENT

State of ___________________

County of ___________________

This record was acknowledged before me on _____________ (date) by __________________ (name(s) of individual(s)).

(Seal)

_____________________________
Signature of Notarial Officer

_____________________________
Title of Office

My Commission Expires: ______________