

## 2022-2023 DEPENDENT 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 **2020 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, 2020 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2020 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2020 paper IRS income tax returns, the 2020 IRS income tax return information is available for the IRS DRT within 8–12 weeks after the 2020 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 **2020 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.**

**A. List below the people in the parents' household. Include:**

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2022, through June 30, 2023, or if the other children would be required to provide parental information if they were completing a FAFSA for 2022-2023. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people, if they now live with the parents, and the parents provide 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, 2023.

**AND**

**B. Number in College:**

- Include in the space below information about any household member (excluding the parents) 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, 2022 and June 30, 2023, 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	
		FAFSA Parent 1	N/A	N/A
		FAFSA Parent 2 (if parent 1 is currently married)	N/A	N/A

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.**

#### A. Student 2020 Tax Filers (Non-filers skip to Section B)

**Instructions:** Only complete this section if the student filed or will file a 2020 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](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 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 2020 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 institution with a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 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.

-----**OR**-----

#### B. Student Non-Tax Filers

**Instructions:** Complete this section if the student will not file and is not required to file a 2020 income tax return with the IRS.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2020.
- The student was employed and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2020 IRS W-2 forms issued to the student 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 2020
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

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

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

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

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

#### IV. Parent Tax Information

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

##### A. Parent 2020 Tax Filers (Non-filers Skip to Section B)

**Instructions:** Only complete this section if the parents filed or will file a 2020 IRS income tax return(s). *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](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 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 parents have used or plan to use the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules.**
- The parents filed separate 2020 IRS income tax returns and the IRS DRT cannot be used. The parents will provide **2020 IRS Tax Return Transcripts** for each parent.
- The parents have filed a foreign tax form or tax return with Puerto Rico, another US Territory, or Freely Associated Stat and have attached a copy of this form.

-----**OR**-----

##### B. Parent Non-Tax Filers

**Instructions:** Complete this section if the parents will not file and are not required to file a 2020 income tax return with the IRS. Parents must also provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2020 IRS income tax return was not filed with the IRS or other relevant tax authority.

**Check the box that applies:**

- Neither parent was employed, and neither had income earned from work in 2020.
- One or both parents were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2020 IRS W-2 forms issued to the parents 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 2020
(Example) ABC's Auto Body Shop	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

## V. Certifications and Signatures

Each person signing below **certifies** that all of the information reported is complete and correct. The student and one parent, whose information was reported on the FAFSA, 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

\_\_\_\_\_  
Parent's Signature (Dependent Students Only)

\_\_\_\_\_  
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