Federal Student Aid Programs  
2021-2022 VERIFICATION WORKSHEET [V5]

Your application was selected for review by the U.S. Department of Education in a process called verification. This process requires Xavier University by federal law [34 CFR, Part 668] to compare the information from your FAFSA with the information provided on this form. Tax documentation (for all tax filers) is required to be submitted with this worksheet. It can be submitted by utilizing the IRS Data Retrieval Process through the student’s FAFSA, by requesting tax return transcript(s) from the IRS, or by submitting a signed copy of 2019 tax return(s). Instructions are below. If there are differences between your application and the documents you’ve submitted, a staff member in the Office of Student Financial Services will make corrections. **We cannot process your financial aid award until verification has been completed.** Note for current students: Verification documents must be submitted before an award will be prepared. Please provide the required documents by June 1.

**WHAT YOU SHOULD DO**

1. **Collect your [and your parents’ or spouse’s] financial documents (choose an option from below)**
   - a. Utilize the IRS Data Retrieval tool (DRT) on the FAFSA and transfer figures into the FAFSA. If you and/or your parents are eligible to use the IRS DRT but did not, **you are encouraged to return to your online FAFSA and use the IRS tool or**
   - b. Students and/or parents may contact the IRS to obtain official tax return transcripts by phone at 800-908-9946 or online at [http://www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) (Select Get Transcript Online or By Mail and then select Return Transcript)
   - c. Submit signed copies of your (and/or your parents’) 2019 tax return(s) and Schedules (if filed).

2. **Complete all sections and sign the worksheet.**

3. **Return the completed worksheet, tax forms and any other documents to the Office of Student Financial Services, Xavier University:**
   - Mail: 3800 Victory Parkway, Cincinnati, OH 45207-5111  
   - Email: xufinaid@xavier.edu  
   - Fax: 513-745-2806

4. Xavier will review the information on these documents and make corrections if necessary. If you have questions about completing this worksheet, please contact us at 513-745-3142.

**A STUDENT INFORMATION [PLEASE PRINT]**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M.I.</th>
<th>Xavier ID</th>
</tr>
</thead>
</table>

Address [include apt. #]  

City  

State  

Zip Code  

Date of Birth  

Student Email Address  

Daytime Phone [include area code]  

Parent Email Address
### B FAMILY INFORMATION

**Dependent Students:** List the people in your parents’ household, including: (a) yourself and your parent(s) including stepparent] even if you don’t live with your parents; and (b) your parents’ other children, even if they don’t live with your parent(s), if (1) your parents provide more than half of their support from July 1, 2021, through June 30, 2022, or (2) the children would be required to provide parental information when applying for federal student aid; and (c) other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2021, through June 30, 2022.

**Independent Students:** List the people in your household, including: (a) yourself, and your spouse if you have one; and (b) your children, if you will provide more than half of their support from July 1, 2021, through June 30, 2022; and (c) 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 from July 1, 2021, through June 30, 2022.

**Write the names of all household members.** Also write in the name of the college for any family member, excluding your parent(s), who will be attending college at least half-time between July 1, 2021, and June 30, 2022, and will be enrolled in a degree, diploma or certificate program. If you need more space, attach a separate page.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Self</td>
<td>Xavier University</td>
</tr>
</tbody>
</table>

### C TAX FORMS AND INCOME INFORMATION

- All tax filers must use the IRS Data Retrieval, submit federal tax return transcript from the IRS, or submit a copy of their signed 2019 federal tax return and any schedules. **Please check here if you and/or your parents used the IRS Data Retrieval on the FAFSA.**

- Check the box below for those individuals who did not and are not required to file a 2019 federal income tax return.

For non-filers, list below the employer(s) and any income received in 2019 [use W-2 forms or other earning statements]. A W-2 must be submitted for each source of income. Parents/independent students must also submit an IRS Verification of Non-Filing letter.

- **You**
- **Your spouse**
- **Parent#1 [father/mother/step]**
- **Parent#2 [father/mother/step]**

*IRS Verification of Non-Filing may be requested at [www.irs.gov](http://www.irs.gov) or by mail using IRS Form 4506-T. Additional information can be found at [https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them](https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them)*

<table>
<thead>
<tr>
<th>Name of Employer</th>
<th>Student Amount</th>
<th>Spouse or Parent(s) Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### C  Tax Forms and Income Information [CONT.]

All tax filers and non-tax filers must list any untaxed income received in 2019. **Be sure to enter zeroes if no funds were received.** [In the Free Application for Federal Student Aid [FAFSA]: Students, see question 44, and/or parents, see question 92.] Failure to complete this section will delay the processing of your financial aid.

<table>
<thead>
<tr>
<th>Student [spouse]</th>
<th>Calendar Year 2019</th>
<th>Parent(s) [step-parent]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FAFSA Questions 44 and/or 92</td>
<td></td>
</tr>
<tr>
<td>$</td>
<td>Payments to tax-deferred pensions and retirement savings plans [paid directly or withheld from earnings] including, but not limited to, amounts reported on W-2 Form Boxes 12a - 12d, codes D, E, F, G, H, and S. <strong>Don’t report amounts listed in DD.</strong></td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1 – total of lines 15 + 19.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>Tax exempt interest income from IRS Form 1040 – line 2a.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>Untaxed portions of IRA distributions and pensions from IRS Form 1040 – (lines 4a + 4c) minus (lines 4b + 4d). <strong>Exclude rollovers. If negative, enter a zero here.</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

### D  High School Completion

Provide one of the following documents that indicate the student’s high school completion status (check which is attached):

- A copy of the student’s diploma.
- A copy of the student’s final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student’s GED certificate or transcript.
- If state law requires a home-schooled student to obtain a secondary school completion for homeschool (other than a high school diploma or recognized equivalent), a copy of that credential.
- If state law does not require a home-schooled student to obtain a secondary school completion credential for homeschool, a transcript or the equivalent, signed by the student’s parent or guardian that lists the secondary school courses the student completed & documents the successful completion of a secondary school education in a homeschool setting.
E  IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE

Students may choose either option a or b (see page 5) based on whether or not they are able to come into the Office of Student Financial Services in person.

a. To Be Signed at Xavier

i. The student must appear in person at Xavier University (Office of Student Financial Services) to verify his or her identity by presenting an unexpired 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 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:

Statement of Educational Purpose

I certify that I __________________________ 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 Xavier University for 2021-2022.

________________________________________  __________________________  ________________________
Student Signature                                      Date                             XU Student ID
E  IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE [CONT.]

b. To Be Signed in Front of a Notary
   i. If the student is unable to appear in person at Xavier University (Office of Student Financial Services) to verify his or her identity, the student must provide to the institution (a) a copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver’s license, other state-issued ID, or passport, and (b) the original Statement of Education Purpose provided below, which 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.

Statement of Educational Purpose

I certify that I __________________________ am the individual signing this Statement of 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 Xavier University for 2021-2022.

________________________________________  __________________________  __________________________
Student Signature                  Date                  XU Student ID

Notary’s Certificate of Acknowledgement

State of __________________________________ City/County of __________________________

On __________________________, before me, __________________________
Date                  Notary’s Name

personally appeared, __________________________, and proved to me on the basis of

Name of Signer [printed] satisfactory evidence of identification __________________________ to the above-named

Type of Government Issued Photo ID Provided

person who signed the foregoing instrument.

WITNESS my hand and official seal

________________________________________                     (seal)                     Notary Signature

My commission expires on __________________________.
By signing this worksheet, I [we] certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

<table>
<thead>
<tr>
<th>Student Signature</th>
<th>Date</th>
<th>Parent Signature [dependent students only]</th>
<th>Date</th>
</tr>
</thead>
</table>

Office of Student
Financial Services
3800 Victory Parkway
Cincinnati, Ohio  45207-5111
Phone 513-745-3142
Fax 513-745-2806
Email xufinaid@xavier.edu
www.xavier.edu/financial-aid