



**2022-2023 VERIFICATION WORKSHEET**

**STANDARD FORM**

Purpose: Texas Southern University Office of Student Financial Assistance has received the results of your 2022-2023 Free Application for Federal Student Aid (FAFSA). The financial aid program rules (34 CFR, Part 668) state that before awarding federal student aid, TSU may ask you to confirm the information you, your spouse, and/or your parent(s) reported on your FAFSA. Verification is the process of confirming the accuracy of data that is provided on the FAFSA. You are required by law to provide all necessary documents to complete verification. Failure to comply will result in a non-disbursement of any potential aid funding.

**A. STUDENT INFORMATION**

LAST	FIRST	MI	T00 TSU ID
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**Criteria for Independent Students by Federal Guidelines:**  
 Generally to be independent for the 2022-2023 award year, the student must have been born before January 1, 1998, married as of the date the FAFSA was completed, working on a master’s or doctorate degree, currently serving on active duty in the U.S. Armed Forces, a veteran of the Armed Forces, have children that you provide ½ or more of their support (must be documentable), have dependents that you provide ½ or more of their support (must be documentable) or an Orphan or Ward of the Court. Students facing special circumstances such as an Unaccompanied Homelessness youth may also qualify as independent. Refer to the FAFSA for complete instructions. If you are not sure of your dependency status, please contact TSU OSFA.

**PLEASE CHECK ONE:**

**DEPENDENT STUDENTS (Complete form using information for both parent(s) and student)**

- List names of all persons in your parent(s) household in **section B**. Include yourself, your parents (and step-parents) and their other children (even if they do not live with your parents) if your parents will provide more than half of their support from July 1, 2022 through June 30, 2023, or if they will be required to provide parental information on the 2022-23 FAFSA.
- Also include other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue that support through June 30, 2023.

**INDEPENDENT STUDENTS (Enter the information for the student and spouse (if married))**

- List names of all persons in your household in **section B**. Include yourself, your spouse (if married) and all children (even if they do not live with you) if you will provide more than half of their support from July 1, 2022 through June 30, 2023, or if they will be required to provide parental information on the 2022-23 FAFSA.
- Also include other people if you provide MORE THAN HALF of their support and will continue to provide more than half of their support through June 30, 2023.

**B. FAMILY/HOUSEHOLD INFORMATION**

Write the names of all household members. Also write in the name of the college for any household member, (dependent students exclude parents college), who will be attending college, at least half-time between July 1, 2022 and June 30, 2023, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be enrolled at least ½ time?
Missy Jones (example)	18	Sister (example)	Central University (example)	Yes
		<b>Self</b>	<b>Texas Southern University</b>	<b>Yes</b>

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes including the time to review instructions, search existing data resources, and gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, Washington, DC 20202-5345.

**C. TAX FORMS AND INCOME INFORMATION TO BE VERIFIED**

**1. TAX RETURN FILER:** This section should be completed by individuals who filed a 2020 tax return.

***The Data Retrieval Tool***

*The most accurate method of entering income information into the FAFSA is by using the IRS Data Retrieval Tool in FAFSA on the Web. If the student or parent have not already used the DRT, go to FAFSA.ed.gov, log in to the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the application. From there, follow the instructions to determine if the student(spouse)/parent is eligible to use the IRS Data Retrieval Tool to transfer 2020 IRS income tax information into the student’s FAFSA. In most cases it takes 2 – 3 weeks after a 2020 electronic IRS income tax return has been accepted by the IRS and up to eight weeks for paper IRS tax return filers to be eligible to use the DRT. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

**STUDENT (SPOUSE)**

- Check here if the Student (and Spouse) used the Data Retrieval Tool.
- Check here if the Student (and Spouse) did not use DRT and are submitting a copy of their 2020 Federal Tax Return Transcript.

**PARENT(S)**

- Check here if the Parent (and Spouse) used the Data Retrieval Tool.
- Check here if the Parent(s) did not use DRT and are submitting a copy of their 2020 Federal Tax Return Transcript.

**\*\*How to obtain a copy of the IRS Tax Return Transcript**

To obtain an IRS Tax Return Transcript, go to [www.irs.gov](http://www.irs.gov) and click on the “Get Your Tax Record” link, or call 1-800-908-9946.

**2. NON-FILER:** This section should be completed by individuals who did not file a 2020 tax return.

**DEPENDENT STUDENT ONLY**

- The Student was not employed, had no earned income from work in 2020, did not and was not required to file a 2020 Tax Return.
- Check here if the student did work, but did not file a 2020 tax return. Complete non-filer table below, attach all 2020 W-2’s. If self-employed, attach a statement certifying the amount of Adjusted Gross Income earned and Income Tax Paid for 2020.

**INDEPENDENT STUDENT (SPOUSE)**

- The Student (and Spouse) was not employed and had no earned income from work in 2020. Attach Non-filing Status Verification for the Student (Spouse) - \*\*See Instructions below.

**PARENT(S)**

- The Parent(s) was not employed, had no earned income from work in 2020, did not and was not required to file a 2020 Tax Return. Attach verification of Non-filing Status Verification for parent(s) – \*\*See instructions below.
- Check here if the Parent(s) did work, but did not file a 2020 tax return. Complete non-filer table below, attach all 2020 W-2’s. If self-employed, attach a statement certifying the amount of Adjusted Gross Income earned and Income Tax Paid for 2020. Parent(s) must also submit a Non-Filing Status Verification – \*\*See instructions below.

**INDEPENDENT STUDENT (SPOUSE)**

- Check here if the Student (Spouse) did work, but did not file a 2020 tax return. Complete non-filer table below, attach all 2020 W-2’s. If self-employed, attach a statement certifying the amount of Adjusted Gross Income earned and Income Tax Paid for 2020. Student (Spouse) must also submit a Non-Filing Status Verification – \*\*See instructions below.

**\*\*How to obtain a copy of the Non-Filing Status Verification**

The student (spouse) or parent must submit a 4506-T Non-Filing Verification can be requested by calling 1- 800-908-9946.

**3. NON-FILER TABLE:** Attach a copy of all W-2 forms received from all employers for 2020.

List below the names of all the parent’s and student’s (and spouse’s) employers even if they did not issue an IRS W-2 form, the amount earned from each employer in 2020. *If more space is needed, attach a separate page with the parent’s name and Social Security Number at the top.*

Student (Spouse) / Parent Name	Employer’s Name	2020 Wages Earned	W-2 Provided?
		\$	
		\$	
		\$	
		\$	

Dep Student     Indep Student    Name: \_\_\_\_\_    TSU ID: T00 \_\_\_\_\_

**D. UNTAXED INCOME: DO NOT LEAVE THESE SECTIONS BLANK.** Complete all sections regardless to whether you had untaxed income in that category. Enter the total amount for a 12 month period. If an item does not apply, put a zero or N/A. This form may be returned to you for completion if left blank.

Student (Spouse)	Additional Financial Information	Parent
\$	Tax-deferred pension/savings (paid directly to or withheld from earnings, such as 401k and 403b plan): W2, BOX 12 a-d CODE: D,E,F,G,H,S:	\$
\$	Child support received:	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). <b>Don't Include</b> the value of on-base military housing or the value of a basic military allowance for housing	\$
\$	Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIG) and/or VA Educational Work-Study Allowances.	\$
\$	Other untaxed income or benefits not reported in items 45a through 45h (for Student) and/or 94a through 94h (for Parents), such as worker's compensation, disability, untaxed portions of health savings accounts from IRS Form 1040 – Line 25. <b>Don't include</b> extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed social security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
\$	Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not included on this form and that is not part of a legal child support agreement.	\$

**E. Sign this Worksheet**

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

By signing this worksheet, I certify that all the information reported to qualify for Federal student aid is complete and correct. I also acknowledge that verification may result in a change in my current award package, if any.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

**Please send your documents to:**  
Texas Southern University  
Office of Student Financial Assistance  
3100 Cleburne Street  
Houston, TX 77004



## 2022-2023 Dependency Override Form

### A. Completing this form.

For consideration of this waiver, **you must complete this form and attach the supporting documentation listed below.** Incomplete applications cannot be reviewed. Students must re-apply for a dependency override each year. **The deadline date for submission of all materials is the 12<sup>th</sup> class day of the first semester of the student’s enrollment for the academic year.**

### B. Purpose of Dependency Override

According to the federal regulations, *dependent* students **are** required to use natural or adoptive parent’s information only when completing the Free Application for Federal Student Aid (FAFSA). On a case-by-case basis the Office of Student Financial Assistance may make a professional judgment and waive the submission of parental information for dependent students.

By Law, the following conditions *do not* qualify as “unusual circumstances” or do not merit a dependency override (1) parents refusing to contribute to a student’s education; (2) Parents unwilling to provide information on the application or for verification; (3) parents not claiming the student as dependent for income tax purposes; (4) students demonstrating self-sufficiency. *Also, a student not living with their parents does not automatically* qualify the student for a dependency override.

### C. Applicant name and address (please print)

	Email Address
Student’s First and Last Name	TSU ID Number
Address	Phone Number
City	
State	
Zip	

### D. Required Documentation (*all students*)

**The following items must be submitted with this form for the appeal to be considered. Incomplete appeals will not be reviewed.**

1. A brief letter of explanation. The letter must explain why you are requesting a dependency override; contain information on *both parents*; indicate with whom you are currently residing; and how you provided for your expenses in 2020.

2. Did you file a 2020 IRS tax return?

Yes, attach a completed and signed 2022-2023 TSU Independent Verification standard worksheet and attach a copy of the **2020 IRS Tax Return Transcript** with this application and verification worksheet—**not photocopies of the income tax return.** To obtain an 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. Order the Tax Return Transcript, **the tax account transcript is not an acceptable form of documentation; verify you are requesting the, “2020 IRS TAX RETURN TRANSCRIPT.”**

No, attach a completed and signed 2022-2023 TSU Independent Verification standard worksheet, Non-filing Letter, and 2020 W2’s or Wage and Income Transcript from the IRS ([www.irs.gov](http://www.irs.gov))

Name: \_\_\_\_\_ TSU ID: T00\_\_\_\_\_

- Two letters from independent sources such as a teacher, the AFDC agency, a social worker, a psychologist, a minister, a counselor, the organization with which you lived in 2020 or some other official source who can verify your independence from your parents. **All letters must be notarized or submitted on an official letterhead for the organization and include telephone number and signature of the individual writing the supporting statement.**

**E. Student's Certification:**

**Warning:** By signing this form you confirm that the information is true. If you use this form to establish eligibility for federal student aid and purposely give false or misleading information, you may be fined \$10,000, sentenced to jail or both.

**Student's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**FOR OFFICE USE ONLY --Do not write below this line**

Action taken:    Approved                      Denied

Professional judgment comments:

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**Reviewed by:** \_\_\_\_\_ **Date:** \_\_\_\_\_