



Financial Aid Office
11900 Colonel Glenn Road, Suite 1000
Little Rock, AR 72210

Phone 501-202-7486
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Financialaid@bhclr.edu

2023-2024 Verification Worksheet-Tracking Group V1

STEP 1 – STUDENT INFORMATION

Last Name	First Name	Student ID Number
Student’s Street Address	City/State/Zip	DOB
Phone Number	Email Address	

STEP 2 – FAMILY INFORMATION

If you are DEPENDENT student, list below the people your parents will support between July 1, 2023 and June 30, 2024. Include:

- yourself, even if you don’t live with you parents
- your parent(s) – (including step-parents)
- your parent(s)’ other children (even if they don’t live with your parent(s), are under 24 years of age, and (a) your parent(s) will provide more than half of their support or (b) if they would be required to give parental information when applying for Federal Student aid.)

If you are an INDEPENDENT student, include:

- yourself
- your spouse (if married)
- your children if you will provide more than half of their support from July 1, 2023 through June 30, 2024
- other people only if they live in your household and you provide more than half of their support and will continue to do so from July 1, 2023 through June 30, 2024.

Include other people as part of your family only if:

- they now live with your parent(s) and received more than half of their support from your parent(s) AND
- they will continue to get more than half of their support from July 1, 2023 through June 30, 2024
- If you are considered a dependent student by FAFSA standards.

Student Name _____

Student ID Number _____

List your name first then the names of any members in your household based on the guidelines above. If you need more space, attach a separate page.

Full Name	Age	Relationship	Name of College
		SELF	BHCLR

DO NOT LEAVE ANY QUESTIONS UNANSWERED. YOU MUST “CHECK” A BOX FOR EACH QUESTION.

STEP 3 - STUDENT’S INCOME INFORMATION

Check **ONLY** one box below. See “Verifying Income Information” Step 6 on how to request your IRS Tax Return Transcript.

Check here if you did file a 2021 Federal Tax Return and you used the IRS Data Retrieval process when completing/updating your 2023-2024 FAFSA

Check here if you did file a 2021 Federal Tax Return and a 2021 Federal Tax Return Transcript is attached. (See Step 10)

- Attach a copy of your 2021 W-2(s)

Check here if you did NOT file a 2021 Federal Tax Return and weren’t required to.

- If you did not file a 2021 Federal Tax Return, but did work in 2021 and had earnings, please state the name of your employer(s) below and the total amount earned in 2021
- Attach a copy of your 2021 W-2(s)
- Fill out the 4506-T form and send to the IRS. A paper transcript will be mailed to the requestor within 5-10 days. Transcripts ordered using this method can be mailed directly to BHCLR by the IRS only if the tax filer requests this on line 5.

Total Amount Earned in 2021 from employment: _____

Employer’s Name(s) _____

STEP 4 - PARENT OR SPOUSE INCOME INFORMATION

Check **ONLY** one box below. See “Verifying Income Information” Step 6 on how to request your IRS Tax Return Transcript.

Check here if you did file a 2021 Federal Tax Return and you used the IRS Data Retrieval process when completing/updating you 2023-2024 FAFSA

- Attach a copy of your 2021 W-2(s)

Check here if you did file a 2021 Federal Tax Return and a 2021 Federal Tax Return Transcript is attached. (See Step 10)

- Attach a copy of your 2021 W-2(s)

Check here if you did NOT file a 2021 Federal Tax Return and weren’t required to.

- If you did not file a 2021 Federal Tax Return but did work in 2021 and had earnings, please state the name of your employer(s) below and the total amount earned in 2021
- Attach a copy of your 2021 W-2(s)
- Fill out the 4506-T form and send to the IRS. A paper transcript will be mailed to the requestor within 5-10 days. Transcripts ordered using this method can be mailed directly to BHCLR by the IRS only if the tax filer requests this on line 5.

Total Amount Earned in 2021 from employment: _____

Employer's Name(s) _____

STEP 5 - SIGN THIS WORKSHEET

By signing this worksheet, I certify all the information reported is complete and correct:

Student Date

Parent Signature (IF student dependent)/Spouse Signature (if married) Date



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STEP 6 - VERIFYING INCOME INFORMATION

According to federal regulations, schools will no longer be able to accept photocopies of tax returns. The best way to verify income is by using the **IRS Data Retrieval Tool** when completing or updating your FAFSA on the web. If you do not use this method when completing or updating your FAFSA you must submit a **2021 IRS Tax Return Transcript**. To request an IRS Tax Return Transcript visit www.irs.gov and use Form 4506-T, or go to the "Tools" section on their website and click on "Get A Tax Transcript", or call 800-908-9946. Be sure to only request a Tax Return Transcript, NOT an Account Transcript. After using the IRS Data Retrieval, tool students are advised to not make any changes to either parent(s)/student's income information on their FAFSA. Please contact the Financial Aid Office if you have had a change in income that is not reflected on your FAFSA.

How to Use the IRS Data Retrieval Tool?

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool, complete the following steps:

1. Go to www.studentaid.gov and select the "Start Here" button
2. Log in using your FSA ID
3. Select the "Continue" or "Make a Correction" button
4. Select the "Financial Information" tab from the top of the page.

Instructions for the parent to request the parent IRS information:

1. Go to "Parent Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, select which parent is providing information on the FAFSA
4. Enter the FSA ID for the parent providing the information
5. Click "Link to IRS"
6. Review the information displayed and select the "Transfer My Information into the FAFSA" option

Instructions for the student to request the student IRS information:

1. Go to "Student Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, click "Link to IRS"
4. Review the information displayed and select the "Transfer My Information into the FAFSA" option
5. Proceed to the Sign and Submit page