

2023-2024 Verification Instructions

Your application was selected for review in a process called "Verification". Verification is mandated by the U.S. Department of Education and requires schools to gather additional documentation to check the accuracy of information submitted on the FAFSA.

To facilitate this process, you are required to complete and submit a signed **2023-2024 Independent Student Verification Worksheet**, (see below), and certain other forms of income documentation to the Financial Aid Office.

The income tax documents that we accept are based on policy put forth by the U.S. Department of Education. We can only accept either:

- **An updated FAFSA using the IRS Data Retrieval Tool (DRT), OR**
- **A signed copy of the 2021 Income Tax Return and All Schedules you and/or your spouse completed, OR**
- **A 2021 IRS Tax Return Transcript**

If you did not use the **IRS Data Retrieval Tool** when completing the FAFSA, **we encourage you to go back to studentaid.gov and update your tax information via the Retrieval Tool. This is significantly faster than requesting a tax return transcript from the IRS.**

To Obtain a Tax Return Transcript from the IRS

If you are unable to use the IRS Data Retrieval Tool, or do not have a signed copy of the 2021 Income Tax Return and all Schedules you and/or your spouse completed, please request a **2021 IRS Tax Return Transcript** as quickly as possible. There are a couple of ways to request a transcript from the IRS:

1. Go to www.irs.gov/transcript
 - a. Click 'Get a Tax Transcript Online.'
 - b. Create an account.
 - c. **Select 'Return Transcript' for Tax Year '2021.'** Do not select the 'Account Transcript.'
 - d. **Print** PDF copy of the transcript.
2. Go to www.irs.gov/transcript
 - a. Click 'Get a Tax Transcript by Mail.'
 - b. Provide the date of birth, address, and SSN of person listed on the 2021 IRS Income Tax Return.
 - c. **Select 'Return Transcript' for Tax Year '2021.'** Do not select the 'Account Transcript.'
 - d. The transcript will be mailed to the address on the Return.
3. Call the IRS at 1-800-908-9946.
4. Complete IRS Form 4506T-EZ at <https://financialaid.ecu.edu> Under Forms, select 2023-2024.

* If the student and spouse filed **separate** 2021 IRS income tax returns, **2021 IRS Tax Return Transcripts or a signed copy of the 2021 Income Tax Return and All Schedules you and/or your spouse completed**, must be provided for **each**.

** **If you or your spouse were not required to file a 2021 IRS Income Tax Return: Submit 2021 IRS Verification of Non-filing Letter dated on/after October 1, 2022. To request from IRS, submit Form 4506-T, box 7, at <https://financialaid.ecu.edu> to the IRS.**

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

1. A **Tax Return DataBase View (TRDBV) transcript** obtained from the IRS for year 2021; contact the IRS at 1-800-908-4490; **AND**
2. A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2021, must provide **both** of the following:

1. A **2021 IRS Tax Return Transcript** (signature not required); **OR a signed copy of the 2021 Income Tax Return and All Schedules you and/or your spouse completed; AND**
2. **A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return,"** that was filed with the IRS.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed a 2021 income tax return with a tax authority other than the IRS may provide a **signed** copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority.

Do not have transcripts sent directly to ECU Financial Aid. You must add the students name and ECU Banner ID before sending it to our office.

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The documents that we accept are based on policy put forth by the U.S. Department of Education. We can accept:

1. An updated FAFSA using IRS Data Retrieval Tool
2. A signed copy of 2021 Income Tax Return and All Schedules you and/or your spouse completed, OR
3. A 2021 IRS Tax Return Transcript

If you did not use the IRS Data Retrieval Tool when completing the FAFSA, we encourage you to go back to studentaid.gov to update your tax data via Retrieval Tool option.

* If you or your spouse were not required to file a 2021 IRS Income Tax Return, you must submit a 2021 IRS Verification of Non-filing Letter dated on or after October 1, 2022. To request from IRS, submit Form 4506-T, box 7, at <https://financialaid.ecu.edu> to the IRS.

Please complete all sections in blue or black ink.

A. INDEPENDENT STUDENT INFORMATION

Last Name	First Name	M.I.	ECU Banner ID Number
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Permanent Phone Number (include area code)	Cell Phone Number (include area code)
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Date of Birth (month and day **ONLY**)

B. INDEPENDENT STUDENT's FAMILY INFORMATION

List the people in your household, including:

- Yourself
- Your spouse (if you are 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 now live in your household and you provide more than half of their support and will continue to do so through June 30, 2024. Attach a separate page if space below is insufficient.

You must complete each column for every household member listed:

Full Name	Age	Relationship to Student	Name of College/Degree Program (If at least half-time 2023-2024)
		<i>SELF</i>	<i>East Carolina University</i>

What you should do:

1. Update your FAFSA **by using the IRS Data Retrieval Tool** OR Collect your (and your spouse's) financial documents (IRS Tax Return Transcript, W-2 forms, etc.).
2. Complete and sign this worksheet.
3. Submit the completed worksheet, tax forms, and any other documents your school requests to the financial aid office.

To Obtain a Tax Return Transcript from the IRS

1. Go to www.irs.gov/transcript. Order a Return Transcript.
2. Call the IRS at 1-800-908-9946.
3. Complete IRS Form 4506T-EZ available at <https://financialaid.ecu.edu>

Important Note: If you filed, or will file an **amended 2021 IRS tax return**, you must follow the instructions on cover sheet.

Due to Federal Privacy Regulations regarding email and the protection of your personal information, we urge you to send documents to our secure FAX at 252-328-4347 or mail all documents to Office of Student Financial Aid, MS510, East Carolina University, Greenville, NC 27858. For materials that may contain a social security number, please cover or remove all but the last four digits. For materials with the date of birth, please cover or remove the year. If you have any questions, please contact our office at 252-328-6610.

