

For your security, we request that you do not send any Personally Identifiable Information (PII) via email or attachments. This may include social security numbers, dates of birth, and other information.



Understanding the Verification Process for V1

**Priority Dates
Returning Students
February 28, 2023**

**New Students
April 30, 2023**

What is verification?

Verification is process in which the Financial Aid Office will review your household data, and income to ensure that your FAFSA is accurate. Approximately 30% of all FAFSA's completed are selected for verification.

What do I need to turn in?

Please refer to your cover letter to determine what forms to submit.

In most instances, the Financial Aid Office will request copies of the following forms:

- The enclosed Verification Worksheet
- 2021 Federal Tax Return & all schedules for the Parents (signed)
 - Note – in cases where the parents did not file a tax return, a Non Filing Form must be submitted.
- 2021 W-2's for the Parents
- 2021 Federal Tax Return & all schedules for the Student (signed) if applicable. Spousal information may be requested for married students.
 - Note – in cases where the student is considered Independent and did not file a tax return, a Non Filing Form must be returned.
 - In the case that a spouse did not file a tax return, a Non Filing Form must be returned.
- 2021 W-2's for the Student (regardless of filing status)

How can I get a copy of my tax return and/or W-2's?

- If you filed a tax return, it is possible to link your tax data to the FAFSA using the IRS Data Retrieval Tool. This is the preferred method. **OR**
- You can log in to your tax software such as Turbo Tax, Tax Act, etc. to retrieve a copy. **OR**
- Contact your tax professional, account, H & R Block, Jackson Hewitt, etc. for a copy. **OR**
- Complete the **4506-C Request form** on the reverse side of this page. We provide one copy, please make copies if necessary. You may choose the box 6a for the tax return, and/or number 8 for the W-2's. All forms will be sent to Chowan's Financial Aid Office. Each person (mom, dad, and/or student) may need to complete a separate form as needed.

How do I turn in my documents?

All documents can be uploaded securely through the student's financial aid portal (NetPartner). Students create an account using their Chowan Student ID Number (found on their letter). Create an account today at netpartner.chowan.edu. You can send pictures, word, and pdf documents through NetPartner.

Uploading Instructions:

- Log in at netpartner.chowan.edu
- Click Menu from the top left
- Choose View Your Documents
- Find the corresponding documents, and click the Upload it Now! Link
- Find the files on your phone, computer, or tablet, and upload

As an alternative, you can also fax documents to us at 252-398-6513. Please remove all Personally Identifiable Information such as social security numbers, and date of birth prior to sending. **Please return all forms as quickly as possible, preferably within 14 days.**

What happens next?

Once all documents are submitted, the Financial Aid Office will review the forms. If the FAFSA needs to be corrected, the office will make corrections on your behalf. After all final corrections are made, the student should not make any other changes to the FAFSA for household or tax data. It is okay to change the schools, address, phone, etc.

Corrections to the FAFSA normally take about 5-7 days. Once the correction is processed, the Financial Aid Office will review the students file to prepare an award package.

What if I have questions or need help?

Students and parents can call the Financial Aid Office at 252-398-6535 for assistance. The office can also be reached by email at finaid@chowan.edu.

Do not sign this form unless all applicable lines have been completed.

Request may be rejected if the form is incomplete or illegible.

For more information about Form 4506-C, visit www.irs.gov and search IVES.

1a. Current name			2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers)		
i. First name	ii. Middle initial	iii. Last name/BMF company name	i. Spouse's first name	ii. Middle initial	iii. Spouse's last name
1b. First taxpayer identification number (see instructions)			2b. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers)		
1c. Previous name shown on the last return filed if different from line 1a			2c. Spouse's previous name shown on the last return filed if different from line 2a		
i. First name	ii. Middle initial	iii. Last name	i. First name	ii. Middle initial	iii. Last name
3. Current address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)					
a. Street address (including apt., room, or suite no.)		b. City	c. State	d. ZIP code	
4. Previous address shown on the last return filed if different from line 3 (see instructions)					
a. Street address (including apt., room, or suite no.)		b. City	c. State	d. ZIP code	
5a. IVES participant name, ID number, SOR mailbox ID, and address					
i. IVES participant name Chowan University		ii. IVES participant ID number 304197	iii. SOR mailbox ID Ruthi1984		
iv. Street address (including apt., room, or suite no.) One University Pl		v. City Murfreesboro	vi. State NC	vii. ZIP code 27855	
5b. Customer file number (if applicable) (see instructions)			5c. Unique identifier (if applicable) (see instructions)		
5d. Client name, telephone number, and address (this field cannot be blank or not applicable (NA))					
i. Client name Chowan University			ii. Telephone number 252-398-6535		
iii. Street address (including apt., room, or suite no.) One University Pl		iv. City Murfreesboro	v. State NC	vi. ZIP code 27855	
Caution: This tax transcript is being sent to the third party entered on Line 5a and/or 5d. Ensure that lines 5 through 8 are completed before signing. (see instructions)					
6. Transcript requested. Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts 1040					
a. Return Transcript <input checked="" type="checkbox"/>		b. Account Transcript <input type="checkbox"/>		c. Record of Account <input type="checkbox"/>	
7. Wage and Income transcript (W-2, 1098-E, 1099-G, etc.) <input checked="" type="checkbox"/>					
a. Enter a max of three form numbers here; if no entry is made, all forms will be sent. 1040, or Letter of Non-filing, and W-2's/Wage & Income Statement					
b. Mark the checkbox for taxpayer(s) requesting the wage and income transcripts. If no box is checked, transcripts will be provided for all listed taxpayers					
Line 1a	<input type="checkbox"/>	Line 2a	<input type="checkbox"/>		
8. Year or period requested. Enter the ending date of the tax year or period using the mm dd yyyy format (see instructions)					
12 / 31 / 2021		/ /		/ /	
Caution: Do not sign this form unless all applicable lines have been completed.					
Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or, if applicable, line 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign; however, if both spouses' names and TINs are listed in lines 1a-1b and 2a-2b, both spouses must sign the request. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-C on behalf of the taxpayer. Note: This form must be received by IRS within 120 days of the signature date.					
<input checked="" type="checkbox"/> Signatory attests that he/she has read the above attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See instructions.					
Sign Here	Signature for Line 1a (see instructions)		Date	Phone number of taxpayer on line 1a or 2a	
	Form 4506-C was signed by an Authorized Representative		Signatory confirms document was electronically signed		
	Print/Type name				
	Title (if line 1a above is a corporation, partnership, estate, or trust)				
	Spouse's signature (required if listed on Line 2a)			Date	
	Form 4506-C was signed by an Authorized Representative		Signatory confirms document was electronically signed		
Print/Type name					

Please complete the requested information below. If you have any questions, please call our office at 252-398-6535.

A. Student Information

Name:	SSN: XXX-XX-_____
Date of Birth:	Phone #:

B. Dependency Status Information:

Are you, the student, married? If yes, complete the section below. If no, skip to step C.

Spouse Full Name	Age	Relationship to Student	College/University in 22-23
		spouse	

C. Parental Information – if the student is not married, complete the information here.

Full Name	Age	Relationship to Student	Marital Status
			<input type="checkbox"/> Single – Never Married <input type="checkbox"/> Married – Date _____ <input type="checkbox"/> Divorced – Date _____ <input type="checkbox"/> Separated – Date _____ <input type="checkbox"/> Remarried – Date _____ <input type="checkbox"/> Living together, but not married

D. Household Information:

If more space is needed, continue this table on a separate page with the student's name and last four of the SSN at the top.

Dependent students are required to list the people in your parents' household, excluding foster children. Include: 1. any siblings residing in the home, and 2. anyone else residing in the home, if your parent will provide more than half of their support from 7/1/22 through 6/30/23.	Independent students are not required to provide parental information. List the people in your household, excluding foster children. Include: 1. your children which you provide more than half of their support, and 2. other people, if you will provide more than half of their support from 7/1/22 through 6/30/23.
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Full Name	Age	Relationship to Student	College/University in 22-23

E. Tax Forms:
Student Information

Check One	Tax Filing Status	Required Documents
	I filed a 2021 Federal Tax Return	Signed Copy of your signed 2021 Federal Tax Return OR use the IRS Data Retrieval Tool and Provide your 2021 W-2's
	I worked, but did not file a 2021 Federal Tax Return	Complete Step F & Provide all W-2's Independent Students – complete the form 4506 and check box 6a
	I did not work or have income	Dependent Students – no information needed Independent Students – complete the form 4506 and check box 6a.
	If you are married, and your spouse did not file a tax return	Complete Step F, and Spouse completes the form 4506 and check box 6a.

Parent Information

Check One	Tax Filing Status	Required Documents
	I/We filed a 2021 Federal Tax Return	Signed Copy of your signed 2020 Federal Tax Return (or use the IRS Data Retrieval Tool) and your 2021 W-2's
	I/we worked, but did not file a 2021 Federal Tax Return	Complete Step F & Provide all W-2's Independent Students – complete the form 4506 and check box 6a
	I/we did not work or have income	Dependent Students – no info needed Independent Students – complete the form 4506 and check box 6a.
	If you are married, and your spouse did not file a tax return	Complete Step F, and Spouse completes the form 4506 and check box 6a.

Student Name: _____

SSN: xxx-xx- _____

F. Income Table:

You are required to attach copies of all 2021 IRS W-2 forms issued to the student, spouse (for independent students) and parent (for dependent students) if not filing a federal tax return. List every employer even if they did not issue an IRS W-2 form.

Use the additional spaces provided if you had more than one job.	Employer's Name – attach additional pages if needed (include student name and ID)	2021 Amount Earned	Was a W-2 Issued?
You (student)			
You (student)			
Spouse (of Student)			
Spouse (of Student)			
Parent # 1 (if listed in Section C)			
Parent # 1 (if listed in Section C)			
Parent # 2 (if listed in Section C)			
Parent # 2 (if listed in Section C)			

G. Assets

Below, provide the assets as of **today's** date for each applicable column.

Person	Cash, Savings and Checking <i>Do not include financial aid</i>	Net Investments, including real estate – (Real estate, stocks, bonds, CDs, etc.) <i>Do not include the home in which your parents live, retirement plans 401-K plans, pension funds, annuities</i>	Net Business Worth or investment farms <i>Do not include a family farm or business with less than 100 or fewer full time employees</i>
You (student)			
Spouse (if applicable)			
Parent # 1 (if dependent & listed in Section C)			
Parent # 2 (if dependent & listed in Section C)			

H. Untaxed Income

Provide any additional untaxed income. **Please list the amount received for 2021. List '0' if necessary.** Student/Spouse Parent(s)

	Student/Spouse	Parent(s)
Payments to tax deferred pension and savings plans (paid directly or withheld from earnings.)	\$	\$
Child support received for all children. Do not include foster or adoption payments.	\$	\$
Child support paid for all children.	\$	\$
Housing, food and other living allowances paid to members of the clergy or others.	\$	\$
Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity. Compensation (DI) and/or VA Educational Work-Study Allowances.	\$	\$
Other untaxed income such as worker's comp, disability, untaxed portions of health savings accounts from IRS 1040 Schedule 1 – Line 25, etc. Do Not List Social Security Benefits.	\$	\$
Other – please list _____	\$	\$

In special cases of challenging economic times - layoffs and wage/hour reductions, income loss for student and/or parent, costly out of pocket medical situations, etc., the office may be able to process a Reconsideration of Financial Status. Please send an email to finaid@chowan.edu.

I. Certification - Please return this information within the next 14 days.

By signing this worksheet, I (we) certify that all information reported is complete and correct. Failure to complete verification will render the student ineligible for need-based aid, including loans, for that academic year.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

For your security, we request that you do not send any Personally Identifiable Information (PII) via email or attachments. This may include social security numbers, dates of birth, and other information.

Priority Dates

Returning Students February 28, 2023	New Students April 20, 2023
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Return to: Chowan University - Financial Aid Office – One University Place – Murfreesboro, NC 27855
Phone: 252-398-6535 – Fax: 252-398-6513 – Email: finaid@chowan.edu