2019-2020 Verification Worksheet

Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

A. Student Information

Last Name *First Name* *M.I.* *Social Security or ID Number*

Address (include apt. #) *City* *State* *Zip Code*

Date of Birth *E-mail Address* *Phone Number (include area code)*

B. Family Information (Please check the appropriate box)

Per your **2019-2020** FAFSA information, were you:

☐ **Independent** ☐ **Dependent**

List ALL household members. Include: the student, spouse (if married); Dependents should list parent(s)-including any stepparent if applicable; Student's, spouse's & parents' other children and any other individual that will receive more than half of their support from 7-1-19 to 6-30-20 (or if they would be classified as dependent on the 19-20 FAFSA; and any other household member(s). Also write in the name of the college for any family member, **excluding** your parent(s), who will be enrolled at least half-time in a degree, diploma, or certificate program at an eligible postsecondary educational institution between July 1, 2019 and June 30, 2020. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be enrolled at Least Half-Time (Yes or No)
Example: Martha Jones	*24*	*Wife*	*City University*	
		Self		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is in accurate.

C. Tax Forms and Income Information

1. Verification of 2017 IRS Income Tax Return Information for Student and/or Parent Tax Filers.

Important Note: The instructions below apply to the student and spouse, if the student is married; or parent, if the student is dependent. Notify the financial aid office if the student (spouse) or married parents filed separate IRS income tax returns for 2017 or had a change in marital status after the end of 2017 tax year on December 31, 2017.

Instructions: Complete this section if the student and spouse (or married parents) filed or will file a 2017 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2017 IRS income tax information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. In most cases, for electronic filers, 2017 IRS income tax return information for the IRS DRT is available within 2-3 weeks after the 2017 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2017 paper IRS income tax return, the 2017 IRS income tax return information is available for the IRS DRT within 8-11 weeks after the 2017 paper IRS income tax return have been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

Check all that apply:

- ☐ The **student** has used the IRS Data Retrieval Tool (DRT) to transfer 2017 IRS income return information.
- ☐ The **student** has not yet used the IRS DRT but will use the tool to transfer 2017 IRS income tax information into the students FAFSA.
- ☐ The **student** is unable or chooses not to use the IRS DRT & instead will provide a 2017 Tax Return Transcript(s).
- ☐ The **parents** have used the IRS Data Retrieval Tool (DRT) to transfer 2017 IRS income return information.
- ☐ The **parents** have not yet used the IRS DRT but will use tool to transfer 2017 IRS income tax information into the students FAFSA.
- ☐ The **parents** are unable or chooses not to use the IRS DRT & instead will provide a 2017 Tax Return Transcript(s).

To obtain a **2017 IRS Tax Return Transcript** you may 1) go to www.IRS.gov and click on the "Get Your Tax Record" link, 2) call 1-800-908-9946 and make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript", or 3) go online to www.irs.gov/transcript, click on the Get Transcript ONLINE button, create an account, and follow the prompts. Use the Social Security Number and date of birth of the first person listed on the 2017 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2017 IRS income tax return). In most cases, for electronic filers, a **2017 IRS Tax Return Transcript** may be requested from the IRS within 2-3 weeks after the 2017 IRS income tax return has been accepted by the IRS. Generally, for filers of 2017 paper IRS income tax returns, the **2017 IRS Tax Return Transcript** may be requested with 8-11 weeks after the 2017 paper IRS income tax return id received by the IRS.

- ☐ If the student and spouse (or married parents) filed separate 2017 IRS income tax returns, the IRS DRT cannot be used and the **2017 tax return transcripts** MUST be provided for both:

____ Check here if a **2017 IRS Tax Return Transcript(s)** is provided.
____ Check here if a **2017 IRS Tax Return Transcript(s)** will be provided later. *(this may delay awarding)*

2. Verification of 2017 Income Information for Student and/or Parent Nontax Filers

Complete this section if the student will not file and is not required to file a 2017 income tax return with the IRS. **All INDEPENDENT nontax-filers must provide confirmation of nonfiling dated on or after October 1, 2018. A confirmation of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7.** If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or foreign government) is also acceptable.

Check all that apply:

- ☐ The student and spouse were not employed and had no income earned from work in 2017.
- ☐ Neither parent was employed and had no income earned from work in 2017.
- ☐ The student, spouse, and/or parent were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and whether and IRS W-2 is provided. [Provide copies of all 2017 IRS W-2 forms issued to the student, spouse (if married) and/or parent by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	Student Amount Earned From Work	Spouse or Parent(s) Amount Earned From Work	IRS W-2 or an Equivalent Document Provided?

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority.

____ Check here if confirmation of nonfiling is provided.
____ Check here if confirmation of nonfiling will be provided later. *(this may delay awarding)*

Verification of 2017 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Tax Return

- A **2017 Tax Return** Transcript (signature not required) for the 2017 tax year (see instructions above); and
- A signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with IRS.
- If Line 15 on 1040X has Form 8962 checked, also attach Form 8962 with the Amended Tax Return

Verification of 2017 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2017 **IRS Tax Return Transcript** or use the IRS DRT must provide a signed copy of the 2017 paper IRS income return that was filed with the IRS and a signed copy of the IRS Form 14309 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- A statement signed and dated by the individual indicating that he or she was victim of IRS identity theft and the IRS is investigating the matter. The statement must also indicate that the individual submitted a form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or
- A copy of a police report if it was filed related to the IRS identity theft.

D. Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information, you may be fines, sent to prison, or both.

Printed Student's Name Date

Parent's Signature (Dependent Students Only) Date

Student's Signature (Required) Date

Spouse's Signature (Optional) Date