

2020–2021 Verification Worksheet - Dependent Student

Your 2020–2021 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 the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents.

If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

Please carefully read ALL instructions for each section PRIOR to completing each section. All fields marked with an asterisk (*) are required. Any manual edits to this form must be confirmed with initials and a date next to each edit.

A. Dependent Student's Information

* _____ * _____ * _____ * _____
 Student's Last Name Student's First Name M.I. Social Security Number

* _____ * _____
 Student's Address (include apt. no.) Student's Date of Birth

* _____ * _____ * _____ * _____
 City State Zip Code Student's Email Address

* _____ * _____
 Student's Home Phone Number (include area code) Student's Alternate or Cell Phone Number

B. Dependent Student's Family Information

Number of Household Members: List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2020, through June 30, 2021, or if the other children would be required to provide parental information if they were completing a FAFSA for 2020–2021. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2021.

Number in College: Include in the space below information about any household member, excluding the parents, who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2020, and June 30, 2021, and include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time?
<i>Marty Jones(example)</i>	28	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>	<i>Trinity College of Nursing & Health Science</i>	



*Name: _____ SSN: _____

C. Dependent Student's Income Information to Be Verified

TAX RETURN FILERS— Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.

Instructions: Complete this section if the student and spouse filed or will file a 2018 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 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies (Select ONLY one):

- The student has used the IRS DRT in FAFSA on the Web to transfer 2018 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA..
- The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the institution with a 2018 IRS Tax Return Transcript(s) or a signed copy of the **2018 income tax return and applicable schedules**.

A **2018 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** must be provided for each.

____ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** is provided.

____ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** will be provided later.



*Name: _____ SSN: _____

2. TAX RETURN NONFILERS— The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2018 income tax return with the IRS.

Check the box that applies (Select ONLY one):

- The student and spouse were not employed and had no income earned from work in 2018.
- The student and/or spouse were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Do NOT list any federal benefits such as, Social Security Income, Social Security Disability, Supplemental Nutrition Assistance Program (SNAP), etc.

If more space is needed, attach a separate page with your name and Social Security Number at the top.

<i>Employer's Name</i>	<i>2018 Amount Earned</i>	<i>IRS W-2 Attached?</i>
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
<i>Total Amount of Income Earned from Work</i>		

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 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.



*Name: _____ SSN: _____

D. Parent’s Income Information to Be Verified

Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

- 1. TAX RETURN FILERS— Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.
- 2. Instructions:** Complete this section if the parents filed or will file a 2018 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 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

Check the box that applies (Select ONLY one):

- The parents have used the IRS DRT in FAFSA on the Web to transfer 2018 IRS income tax return information into the student’s FAFSA.
- The parents have not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school with a **2017 IRS Tax Return Transcript(s)**.

A **2017 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.

If the parents filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules must be provided for each.

_____ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** is provided.

_____ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** will be provided later.



*Name: _____ SSN: _____

2. TAX RETURN NONFILERS— The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2018 income tax return with the IRS.

Check the box that applies (Select ONLY one):

- Neither parent was employed, and neither had income earned from work in 2018.
- One or both parents were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Do NOT list any federal benefits such as, Social Security Income, Social Security Disability, Supplemental Nutrition Assistance Program (SNAP), etc.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

<i>Employer’s Name</i>	<i>2018 Amount Earned</i>	<i>IRS W-2 Attached?</i>
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
<i>Total Amount of Income Earned from Work</i>		

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2018 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.

E. Certification and Signature

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

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

Student’s Signature (Required)

Date

Parent’s Signature (Required)

Date

***Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.***