

2020 – 2021 DEPENDENT VERIFICATION WORKSHEET

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) has been selected for a review process called **verification**. Verification must be completed before federal financial aid can be awarded. Federal financial aid will be awarded upon completion of the entire verification process. Please complete and sign this form, attach all required documents, and submit to the address, fax, or email above. **Blank or incomplete forms will not be processed.** If you have questions about the process, please contact our office.

Important Note: Detailed instructions for the Verification of IRS Tax Data and Income Information are listed on Page 3 of this document. Please refer to these instructions when completing Section C and Section D.

For your protection, please remove all personally identifiable information (PII) such as: SSN, date of birth and driver's license number from your documents prior to submitting them. Also, please include the student's name and VIP ID on all documents.

SECTION A: Student Information

Last Name	First Name	Middle Name	Student VIP ID
Email Address			Cell or Alternate Phone Number

SECTION B: Household Information

List the people in your FAFSA parent(s)' household, including:

- yourself even if you don't live with your parent(s)
- your FAFSA parent(s) (including step-parent)
- your FAFSA parent(s)' other children if (a) your parent(s) will provide more than half of their support between July 1, 2020 and June 30, 2021, or (b) 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 they do not live with your FAFSA parent(s), and
- other people if they now live with your FAFSA parent(s) and your FAFSA parent(s) provide more than half of their support and will continue to provide more than half of their support between July 1, 2020 and June 30, 2021.

Also, provide the name of the college for the household member(s) who will be attending college at least half-time between July 1, 2020 and June 30, 2021 and will be enrolled in a program that leads to a college degree, certificate, or diploma at a postsecondary educational institution (**do not provide college information for parent(s); however make sure parent(s) are listed in the household**). Attach a separate sheet if needed.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half-Time

Section C: FAFSA Parent(s) Tax Forms and Income Information

1. **PARENT TAX FILERS***: You must check at least one of the following. Please refer to instructions listed on page 3.
- Check here if your parent(s) used the IRS Data Retrieval Tool to transfer parent 2018 tax data to the FAFSA
 - Check here if your parent(s) are attaching a **signed** copy of their 2018 Federal Tax Return (1040)
 - Check here if your parent(s) are attaching a 2018 IRS Tax Return Transcript
 - Check here if your parent(s) are attaching a **signed** copy of their amended tax return (1040X). You must also check one of the above-listed methods for verifying 2018 Tax Return data and attach the required documentation.
2. **PARENT NON-TAX FILERS***: Attach a copy of your parent(s) *IRS Verification of Non-Filing Letter* dated on or after October 1, 2019, if they did not file a 2018 Federal Tax Return. Also, please complete the section below and attach a copy of the W-2 form for each source of employment. Misplaced W-2s must be requested from your parent’s employer(s) or the IRS.

Employer’s Name	2018 Amount Earned	IRS W-2 Attached?

Sign here to certify that you did not and are not required to file a 2018 U.S. Federal Tax Return:

Parent’s Signature

Date

***PARENT TAX FILERS & NON-TAX FILERS:**

All FAFSA parents are required to submit copies of all 2018 W-2(s), along with the rest of the required documentation. If parents are in the military, please submit December 2018 Leave and Earnings Statement (LES).

Section D: Student Tax Forms and Income Information

1. **STUDENT TAX FILERS***: You must check at least one of the following. Please refer to instructions listed on page 3.
- Check here if you used the IRS Data Retrieval Tool to transfer student 2018 tax data to the FAFSA
 - Check here if you are attaching a **signed** copy of your 2018 Federal 1040 Tax Return
 - Check here if you are attaching a 2018 IRS Tax Return Transcript
 - Check here if you are attaching a **signed** copy of your amended tax return (1040X). You must also check one of the above-listed methods for verifying 2018 Tax Return data and attach the required documentation.
2. **STUDENT NON-TAX FILERS***: Please complete the section below and attach a copy of the W-2 form for each source of employment. Misplaced W-2s must be requested from your employer(s) or the IRS.

Employer’s Name	2018 Amount Earned	IRS W-2 Attached?

Sign here to certify that you did not and are not required to file a 2018 U.S. Federal Tax Return:

Student’s Signature

Date

***STUDENT TAX FILERS & NON-TAX FILERS:**

All students are required to submit copies of all 2018 W-2(s), along with the rest of the required documentation.

SECTION E: Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is true and accurate. For **dependent students**, only one parent must sign. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail or both.**

Student’s Signature

Date

FAFSA Parent’s Signature (required)

Date

SUBMIT THIS WORKSHEET TO THE FINANCIAL AID OFFICE BY MAIL, EMAIL, FAX, OR IN PERSON

Instructions for the Verification of Tax Return Data and Income Information:

1. **TAX FILERS:** *Federal guidelines require students and parents to verify their 2018 Federal Tax Return Data using one of the following methods:*

Using the Data Retrieval Tool: The best way to verify tax return data is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. Please be aware that you will not be able to see the tax data that is being imported into the FAFSA, but this is the fastest and easiest method to use. If you have not already used the tool, the parent and the student should go to FAFSA.gov, log in to the FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is/are eligible to use the IRS Data Retrieval Tool to transfer 2018 IRS income tax information into the FAFSA.

OR

Ordering a 2018 Tax Return Transcript: You may order a 2018 IRS tax return transcript online at: www.irs.gov. Click on “Get Transcript Online” or “Get Transcript by Mail” or call 1-800-908-9946. Be sure to request the “IRS tax return transcript” and not the “IRS tax account transcript.” You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when your 2018 IRS tax return was filed). If your FAFSA parents are married, and separate 2018 tax returns were filed, 2018 IRS tax return transcripts must be submitted for each parent. Submit the 2018 IRS tax transcript to the Financial Aid Office.

OR

Submitting a Signed Copy of the Filed 2018 Federal Tax Return if you unable to use the IRS DRT: Students and FAFSA parent(s) may submit a signed copy of their filed 2018 federal tax return to the Financial Aid Office. Include pages one and two of your return. Also, include copies of Schedule(s) 1,2,3 and C if filed.

2. **AMENDED TAX FILERS:** *Federal guidelines require students and parents who filed amended 2018 Federal Tax Returns to use one of the methods listed above and submit a signed copy of their Amended Tax Return (1040X) to the Financial Aid Office.*
3. **PARENT NON-TAX FILERS:** *Federal guidelines require FAFSA parent(s) of dependent students to obtain an IRS Verification of Non-filing Letter dated on or after October 1, 2019 if they did not file a 2018 Federal Tax Return.* You may request the Verification of Non-filing Letter using the IRS “Get Transcript Online” tool, or by submitting IRS Form 4506-T and checking box 7. In addition, each non-filer must: sign the TAX NON-FILER statement on this form, list all sources of 2018 income earned from work, list amount of income received from each source and submit copies of all 2018 W-2 forms. (See Section C)
4. **STUDENT NON-TAX FILERS:** Dependent students are not required to obtain an IRS Verification of Non-filing Letter. Students who did not file a 2018 Federal Tax Return must: sign the TAX NON-FILER statement on this form, list all sources of 2018 income earned from work, list amount of income received from each source and submit copies of all 2018 W-2 forms. (See Section D)
5. **ALL TAX FILERS AND NON-TAX FILERS:**
All students and FAFSA parents are required to submit copies of all 2018 W-2(s), along with the rest of the required documentation. If parents are in the military, please submit December 2018 Leave and Earnings Statement (LES).

CHECKLIST (please review to ensure you have all documents necessary for the verification to be completed in a timely manner)

- Parent(s) 2018 W2’s, 2018 Tax Information.
- Student 2018 W2’s, 2018 Tax Information.
- Copies of Schedule(s) 1, 2, 3, and C if applicable
- All sections are complete (Sections A, B, C, D & E).
- All necessary signatures are provided.