



University of South Carolina Beaufort
 Financial Aid/Veterans Affairs Office
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2020–2021 INDEPENDENT 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 any required documents, and submit it to the address, fax, or email above. **Blank or incomplete forms will not be processed.** If you have questions about the process, you can 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.

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: Family Information

List the people in your household, including:

- yourself (and your spouse, if married),
- your children if you will provide more than half of their support between July 1, 2020 and June 30, 2021, even if they do not live with you, and
- other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2020 and June 30, 2021.

Write the names of all household members in the space below. Write in the name of the college for any household member 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. **Attach a separate sheet if needed.**

Full Name	Age	Relationship	College	Will be Enrolled at Least Half-Time
		Self	USC Beaufort	Yes

Student's Name: _____

Student VIP ID: _____

Section C: Student/Spouse Tax Forms and Income Information

1. STUDENT/SPOUSE 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 your 2018 tax data to the FAFSA
- Check here if you are attaching a **signed** copy of your 2018 Federal Tax Return (1040)
- 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: *Federal guidelines require students (and their spouses if married) 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.*

- Check here if you, the student, is attaching an IRS Verification of Non-filing Letter dated on or after Oct 1, 2019
- Check here if you, the student, attempted to obtain the Verification of Non-filing Letter and were not able to obtain the required documentation from the IRS. List the date attempted: _____

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 (Required) _____
Date

3. STUDENT'S SPOUSE NON-TAX FILER: *Federal guidelines require students (and their spouses if married) 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.*

- Check here if you, the student's spouse, is attaching an IRS Verification of Non-filing Letter dated on or after Oct 1, 2019
- Check here if you, the student's spouse, attempted to obtain the Verification of Non-filing Letter and were not able to obtain the required documentation from the IRS. List the date attempted: _____

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:

Spouse's Signature (Required if a non-tax filer) _____
Date

4. STUDENT TAX FILERS & NON-TAX FILERS:
All students (and their spouses if married) are required to submit copies of all 2018 W-2(s), along with the rest of the required documentation.

SECTION D: Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is true and accurate.

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 _____
 Spouse's Signature (optional) 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 their spouses if married) 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 the 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, 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 you (and your spouse if married) 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 (and your spouse if married) 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 you are married and you filed separate 2018 tax returns, 2018 IRS tax return transcripts must be submitted for you and your spouse. Submit the 2018 IRS tax transcript(s) to the Financial Aid Office.

OR

Submitting a Signed Copy of the Filed 2018 Federal Tax Return: You (and your spouse if married) may submit a **signed** copy of your filed 2018 federal tax return to the Financial Aid Office. Include pages one and two of your return (and your spouse's return if married and filed separately). Also include copies of Schedule(s) 1,2,3 if filed.

2. **AMENDED TAX FILERS:** *Federal guidelines require students (and their spouses if married) 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. **NON-TAX FILERS:** *Federal guidelines require independent students (and their spouse, if married) 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. **ALL TAX FILERS AND NON-TAX FILERS:**
All students (and their spouses if married) are required to submit copies of all 2018 W-2(s) along with the rest of the required documentation. If you are in the military, please submit the 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, and 3 if applicable
- All sections are complete (Sections A, B, C, D & E).
- All necessary signatures are provided.