



2020-21 (V1) Standard Verification Worksheet

Your 2020-2021 FAFSA was selected for review in a process called Verification. In this process, your school will be comparing information from your FAFSA with copies of your (and your spouse's if you are married, or your parent's if you are dependent) 2018 Federal tax transcript, and/or W-2 forms and/or other financial documents. Complete this verification worksheet and submit it, along with other required documents, to the financial aid office as soon as possible to avoid a delay in processing your financial aid. If you need help, contact the financial aid office at your school. *Your school must review the requested information under the financial aid program rules (34 CFR, Part 668) and submit corrections if necessary.*

A. Student Information

Last Name	First Name	MI	Student ID Number
Address (include apt. #)			Date of Birth
City	State	Zip Code	Phone Number (include area code)

B. Family Information

Write the names of ALL household members* in the section below. **LIST YOURSELF FIRST!** Also write in the college name for any family member, excluding your parent, who will attend college at least half time between July 1, 2020 and June 30, 2021, and will be enrolled in a financial aid eligible program. If you need more space, attach a separate page.

***Independent Student:** List the people in your household. List yourself first, then your spouse if you have one, and your children **if you will provide more than half of their support from July 1, 2020 through June 30, 2021** even if they do not live with you. Include other people **only** if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.

***Dependent Student:** List the people in your parent's household. List yourself first, then your parent(s)/stepparent(s) (even if you do not live with them), and your parent/stepparent's other children who live with them. Include parent/stepparent's other children who do not live with them **if your parent/stepparent will provide more than half of their support from July 1, 2020 through June 30, 2021 or if the children would be required to give parental information when applying for federal student aid**. List any other people who now live in your parent/ step-parent's household **if your parent/stepparent provides more than half of their support and will continue to provide more than half of their support through June 30, 2021**.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>(example) Pam Smith</i>	<i>25</i>	<i>Wife</i>	<i>City University</i>	<i>(Yes or No)</i>
		SELF		

C. Income and Financial Information to Be Verified

Check this box IF A TAX RETURN WAS FILED and complete the section below. If you (and your spouse or parents, if applicable) filed a 2018 tax return, check all the boxes that apply (see additional instructions included with worksheet).

STUDENT	SPOUSE	PARENT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> used the IRS DRT in <i>FAFSA on the Web</i> to transfer 2018 IRS income tax info to the FAFSA when I first submitted the FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> did not use the IRS DRT in <i>FAFSA on the Web</i> when FAFSA was first submitted, but used DRT to transfer income tax info to the FAFSA on (MM/DD/YY) ____/____/____.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> is unable or chose not to use the IRS DRT and has included a 2018 IRS Tax Return Transcript along with this worksheet to the college financial aid office.

Check this box IF A TAX RETURN WAS NOT FILED and complete the section below. If you (and your spouse or parents, if applicable) are not required to file a 2018 federal tax return, check all the boxes that apply.

STUDENT	SPOUSE	PARENT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> was not employed , earned no income from work, and was not required to file a 2018 tax return.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> was employed and earned income from work in 2018 but was not required to file a tax return. List all employers in the section below even if you did not receive a W-2 Form. Attach all W-2 forms received. Attach a separate sheet if more space is needed.

Employee Name	Employer Name	2018 Amount Earned	W-2 Form Received?
<i>(example) John Doe</i>	<i>Bob's Chicken Hut</i>	<i>\$2000</i>	<i>(Yes or No)</i>

D. Certification and Signatures

Each person signing this worksheet certifies that all information reported on it is complete and correct. If student is dependent, at least one parent must sign.

Your financial aid cannot be processed until the financial aid office receives the required Verification documents. Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668), and submit corrections if necessary.

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

Student's Signature

Date

Parent's Signature (Dependent Students Only)

Date

2020-2021 INSTRUCTIONS FOR VERIFYING TAX INFORMATION

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web. If you have not already used the tool, go to www.fafsa.gov, log in and select "Make FAFSA Corrections." In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2018 IRS income tax information into your FAFSA. You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the DRT.

If you are unable or choose not to use the IRS DRT, you may provide a signed copy of the 2018 IRS Form 1040. It must be signed by the tax filer in the signature line. Do not provide a state tax return. Or, you may obtain an IRS tax return transcript. In **most** cases, for electronic filers, a 2018 IRS Tax Return Transcript is available from the IRS within 2-3 weeks after filing. If you filed a paper return, expect 8-11 weeks for your transcript to be available.

To request an IRS tax return transcript, go to IRS.gov, select "Get Your Tax Record", on the next page select either Request Online or Request by Mail. Use the Social Security Number and date of birth of either person listed on the 2018 tax return and the address on file with the IRS (the address used when your 2018 IRS tax return was filed). Make sure you request the "Return Transcript" and **NOT** the "Account Transcript." Provide the transcript to the Financial Aid office along with your Verification Worksheet.

If you are unable or choose not to use the DRT and cannot access your IRS transcript online, you must call the IRS at 1-800-908-9946 to receive a transcript.

Special Situations:

Amended Returns - If you filed an amended tax return, you must submit an IRS Tax Return Transcript **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return," along with your completed Verification Worksheet.

Victims of IRS Identity Theft - A victim of IRS tax-related identity theft must provide a Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript that includes all of the income and tax information required to be verified **AND** a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Non-IRS Income Tax Returns - An individual who filed or will file a 2018 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a transcript that was obtained at no cost from the relevant taxing authority that includes all of the tax filer's income and tax information required to be verified for the 2018 tax year **OR** a signed copy of the 2018 income tax return along with the Verification Worksheet.

Filing Extensions – An individual who has been granted a filing extension beyond 6 months by the IRS must provide the Verification of Non-Filing from the IRS, a copy of the IRS's approval of an extension, **AND** a copy of the W-2 for each source of employment income received for the 2018 tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the 2018 tax year.