

# **V5B**

## **2019–2020 Verification Worksheet Independent Student**

**(Student is not able to sign at school, signed before Notary. Original Signatures must be provided to the school, NO FAXES or SCANS)**

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 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.

### **Independent Student's Information**

\_\_\_\_\_  
Student's Last Name

\_\_\_\_\_  
Student's First Name

\_\_\_\_\_  
Student's M.I.

\_\_\_\_\_  
Student's Social Security Number

\_\_\_\_\_  
Student's Street 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

### **Number of Household Members and Number in College (Independent Student)**

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

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2019, through June 30, 2020, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other people's support and will continue to provide more than half of their support through June 30, 2020.

**Number in College:** Include in the space below information about any household member 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, 2019, and June 30, 2020, 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 (Yes or No)
		<i>Self</i>		

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 inaccurate.

Student name: \_\_\_\_\_ SS#: \_\_\_\_\_

## Verification of 2017 Income Information for Student Tax 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 2017 or had a change in marital status after December 31, 2017.

**Instructions:** Complete this section if the student and spouse 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](http://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:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2017 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 2017 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 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](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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 2017 IRS income tax returns, the IRS DRT cannot be used and the **2017 IRS Tax Return Transcript(s)** must be provided for each.

\_\_\_\_\_ 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.

Student name: \_\_\_\_\_ SS#: \_\_\_\_\_

## Verification of 2016 Income Information for Individuals with Unusual Circumstances

### Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2017 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2017;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2017;
- **Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2018;**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2017 **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 tax year 2017.

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2017, **must** provide a **signed copy of the 2017 IRS Form 1040X**, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, **in addition to one of the following:**

- **A 2016 IRS Tax Return Transcript** (that will only include information from the original tax return, and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A signed copy of the 2016 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

### Individuals Who Were Victims of IRS Tax Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base view (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) 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.

### Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a **signed copy** of his or her 2017 income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa **must** provide a copy of his or her 2017 tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax transcript **free of charge**, **must** provide documentation that the tax authority charges a fee to obtain that information, **along with a signed copy of his or her 2017 income tax return that was filed** with the relevant authority.

Student Name: \_\_\_\_\_ SS#: \_\_\_\_\_

### Verification of 2017 Income Information for Student Nontax Filers

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 2017 income tax return with the IRS.

**Check the box that applies:**

- The student and spouse were not employed and had no income earned from work in 2017.
- The student and/or spouse were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. [Provide copies of all 2017 IRS W-2 forms issued to the student by the employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2017
<i>Suzy's Auto Body Shop (example)</i>	Yes	\$4,500.00
<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 2017 IRS income tax return was not filed with the IRS or other relevant tax authority.

- \_\_\_\_\_ Check here if IRS confirmation of nonfiling is provided.
- \_\_\_\_\_ Check here if IRS confirmation of nonfiling will be provided later.

### High School Completion Status

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2019–2020:

- A copy of the student's high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other state-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

Student Name: \_\_\_\_\_ SS#: \_\_\_\_\_

## Identity and Statement of Educational Purpose (To be signed in the Presence of a Notary)

If the student is unable to appear in person at \_\_\_\_\_ to  
(Name of Postsecondary Educational Institution)  
verify his or her identity, **the student must also provide to the institution:**

- a) A copy of the **unexpired valid government-issued photo identification (ID)**, that is acknowledged in the notary statement below, or that is **presented to a notary**, such as, but not limited to, a driver's license, other state-issued ID, or passport; **and**
- b) The original **Statement of Educational Purpose**, which is provided below, **must be notarized**. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

### . Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

**Statement of Educational Purpose** and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending \_\_\_\_\_ for 2019-2020.

(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

### Notary's Certificate of Acknowledgment (Notary certification may vary by state)

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_ before me \_\_\_\_\_,

(Date)

(Notary Name)

personally appeared \_\_\_\_\_ and proved to me

(Printed name of signer)

on the basis of satisfactory evidence of identification \_\_\_\_\_

(Unexpired Gov't issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

**(SEAL)**

\_\_\_\_\_  
(Notary Signature)

My commission expires on \_\_\_\_\_

(Date)

Student Name: \_\_\_\_\_ SS#: \_\_\_\_\_

## Certification and Signature (Independent Student)

### 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 fined, be sent to prison, or both.**

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's ID Number

\_\_\_\_\_  
Student's Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (Optional)

\_\_\_\_\_  
Date