

V5B

2020–2021 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 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.

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, 2020, through June 30, 2021, 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, 2021.

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, 2020, and June 30, 2021, 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 2018 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 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 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 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 school with **2018 IRS Tax Transcript(s) or 201 Signed IRS Tax Return & 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 "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, 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 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 IRS Tax Return Transcript(s) or a 2018 signed IRS Tax Return** must be provided **for each**.

_____ Check here if **2018 IRS Tax Transcript(s) or 2018 Signed IRS Tax Return(s) & applicable schedules** is provided.

_____ Check here if **2018 IRS Tax Transcript(s) or 2018 Signed IRS Tax Return(s) & applicable schedules** will be provided later.

Student name: _____ SS#: _____

Verification of 2018 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2018 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2018, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2018;
- Verification of Non-Filing (VNF) 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, 2019 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received for tax year 2018 **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 2018.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2018, **must provide a signed copy of the 2018 IRS Form 1040X, "Amended US Individual Income Tax Return," that was filed with the IRS** or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return: **or**
- A **2018 IRS Signed Tax Return and the applicable schedules or 2018 IRS Tax 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.

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 if unable to obtain a TRDBV, an equivalent document provided by the IRS **or** a copy of the **signed 2018 income** tax return and the applicable schedules the individual filed with the IRS; **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 a tax authority other than the IRS may provide a 2018 **signed copy** of his or her income tax return that was filed with the relevant tax authority. However, if the accuracy of the tax on the signed copy of the income tax return is questionable, the tax filer must provide a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Student Name: _____ SS#: _____

Verification of 2018 Income Information for Independent 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 2018 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 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 is provided. [Provide copies of all 2018 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 or an Equivalent Document Provided?	Annual Amount Earned in 2018
<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, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of nonfiling from the IRS or other relevant tax authority and was unable to obtain the documentation.

- _____ Check here if IRS confirmation of 2018 nonfiling or a signed statement is provided.
- _____ Check here if IRS confirmation of 2018 nonfiling or a signed statement 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 2020–2021:

- 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 2020-2021.
(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