Verification of Independent Student for 2018-2019

**Student Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Banner ID or NetID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

When a student is selected for verification, a college is required to verify the information inputted onto the FAFSA as being true and accurate. The verification process ensures all financial aid is awarded according to federal and state regulations. Approximately 30% of all financial aid applicants are randomly selected by the federal government for verification. The federal government selected your FAFSA for verification. To complete this, the Financial Aid Office (FAO) is required by law to compare the information on your FAFSA to both the information on this form and any 2016 federal taxes. The FAO is required to update your FAFSA with any corrections. Submit this form to the FAO and provide us with any 2016 federal taxes. You can fax, scan and e-mail, or mail a copy of this form to the FAO. Failure to submit this information in a timely manner may eventually result in account holds, late fees, and loss of aid.

### Section A – Marital Status

What was your marital status when you filed your 2018-2019 FAFSA? (check one)

|  |  |  |  |
| --- | --- | --- | --- |
|  | I am single |  | I am separated |
|  | I am married or remarried |  | I am divorced or widowed |

### Section B - Household Information

In the table below, list the people in your household. Include:

* You, the student.
* Your spouse if you are married.
* Your children or your spouse’s children if you or your spouse will provide more than half of their support from

 July 1, 2018 through June 30, 2019, even if the children do not live with you.

* Other people if they now live with you, and you or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2019.

For each household member you list, write their age, relationship to you (spouse, child, grandparent, etc.), and college name, and if they will attend at least half-time in 2018-2019 in a degree, diploma, or certificate program.

| **Full Name** | **Age** | **Relationship** | **College Enrolled in 2018-19** | **Will be Enrolled atLeast Half-Time?** |
| --- | --- | --- | --- | --- |
|   |  |  |  | Yes or No |
|  |  |  |  | Yes or No |
|  |  |  |  | Yes or No |
|  |  |  |  | Yes or No |
|  |  |  |  | Yes or No |
|  |  |  |  | Yes or No |
|  |  |  |  | Yes or No |

Section C - Student Federal Income

Did you, the student, file a 2016 federal tax return (1040, 1040A, 1040EZ)?

|  |  |
| --- | --- |
|  | No - Complete *Section D* and submit a **Verification of Non-filing Letter** from [www.irs.gov](http://www.irs.gov). |
|  | Yes and I have already used the **IRS Data Retrieval** at [www.fafsa.gov](http://www.fafsa.gov) to transfer this tax return into my FAFSA. |
|  | Yes and I will use the **IRS Data Retrieval** at [www.fafsa.gov](http://www.fafsa.gov) to transfer this tax return into my FAFSA. |
|  | Yes and I have or will submit an **IRS Tax Return Transcript** for 2016 to the Financial Aid Office. |

The final page includes instructions on completing the **IRS Data Retrieval** process, obtaining an **IRS Tax Return Transcript**, and other ways to verify income for individuals with unusual circumstances. **The FAO cannot accept copies of federal taxes (1040, 1040A, 1040EZ).**

**Student Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Banner ID or NetID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

### Section D - Student Wages

Only complete this section if you answered “No” in *Section C*. Did you earn any income from work in 2016?

|  |  |
| --- | --- |
|  | No - I earned no income from work in 2016. I was not employed in 2016. |
|  | Yes - In the table below list each employer and the amount earned from each employer. Attach copies of all 2016  |
|  | IRS W-2 forms issued to you by employers. List every employer even if they did not issue a W-2 form. |

|  |  |  |
| --- | --- | --- |
| **Employer’s name** | **Amount Earned** | **W2 attached? Circle one** |
|  | **$** | Yes or Not issued |
|  | **$** | Yes or Not issued |
|  | **$** | Yes or Not issued |

### Section E – Spouse Federal Income

Did your spouse file a 2016 federal tax return (1040, 1040A, 1040EZ)?

|  |  |
| --- | --- |
|  | I am not married or I am separated - Skip *Section H* andthen complete *Section I* |
|  | No - Complete *Section F* and have your spouse submit a **Verification of Non-filing Letter** from [www.irs.gov](http://www.irs.gov). |
|  | Yes and my spouse has already used the **IRS Data Retrieval** at [www.fafsa.gov](http://www.fafsa.gov) to transfer it into my FAFSA. |
|  | Yes and my spouse will use the **IRS Data Retrieval** at [www.fafsa.gov](http://www.fafsa.gov) to transfer this tax return into my FAFSA. |
|  | Yes and my spouse has or will submit an **IRS Tax Return Transcript** for 2016 to the Financial Aid Office. |

The final page includes instructions on completing the **IRS Data Retrieval** process, obtaining an **IRS Tax Return Transcript**, and other ways to verify income for individuals with unusual circumstances. **The FAO cannot accept copies of federal taxes (1040, 1040A, 1040EZ).**

### Section F – Spouse Wages

Only complete this section if you answered “No” in *Section E.*. Did your spouse earn income from work in 2016?

|  |  |
| --- | --- |
|  | I am not married or I am separated - Complete *Section G* |
|  | No – my spouse earned no income from work in 2016. My spouse was not employed in 2016. |
|  | Yes - In the table below list each of your spouse’s employers and the amount earned from each employer. Attach |
|  | copies of all 2016 IRS W-2 forms issued by employers. List every employer even if they did not issue a W-2 form. |

|  |  |  |
| --- | --- | --- |
| **Employer’s name** | **Amount Earned** | **W2 attached? Circle one** |
|  | **$** | Yes or Not issued |
|  | **$** | Yes or Not issued |
|  | **$** | Yes or Not issued |
|  | **$** | Yes or Not issued |

### Section G – Signatures and Attachments

Each person signing below certifies that all of the information reported is complete and correct. If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

|  |  |  |
| --- | --- | --- |
|  |  |  |
| Student Signature (ink signature) Date |  | Spouse Signature if married (ink signature) Date |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| If required, whose 2016 W2s did you attach? |  | Student |  | Spouse |  | Neither |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| If required, whose Federal Tax Return Transcript did you attach? |  | Student |  | Spouse |  | Neither |

Instructions to Verify Income for Federal Tax Filers

### IRS Data Retrieval Tool (IRS DRT)

The best way to verify federal income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [www.fafsa.gov](http://www.fafsa.gov)*.* This option is available for most students and parents. Login [www.fafsa.gov](http://www.fafsa.gov), click the “**Financial Information**” tab and look for a “**Link to IRS**” button.

### IRS Tax Return Transcript

The other way to verify federal income is by submitting an IRS Tax Return Transcript to the Financial Aid Office. To obtain a copy of an IRS Tax Return Transcript, go to [www.irs.gov](http://www.irs.gov) , under “***Tools”*** click “***Get a Tax Transcript”*** , and then choose the online or by mail option. You can also call 1-800-908-9946. Make sure to request the “**IRS Tax Return Transcript**” and not the “IRS Tax Account Transcript.”

**IRS Amended Tax Returns**

If an individual filed an amended IRS income tax return for tax year 2016, submit the following to the Financial Aid Office:

* A 2016 IRS Tax Return Transcript for the 2016 tax year; and
* A signed copy of the 2016 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

### Victims of IRS Identity Theft

Victims of identity theft who cannot get a 2016 IRS Tax Return Transcript or use the IRS DRT must:

* Call the IRS’s Identity Protection Specialized Unit (IPSU) toll-free number at 800-908-4490. After the IPSU authenticates the tax filer’s identity, request from the IRS an alternate paper tax return transcript known as the TRDBV (Transcript DataBase View). Submit a copy of the TRDBV to the Financial Aid Office.
* Submit to the Financial Aid Office a signed and dated statement indicating that you were a victim of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

### IRS Filing Extensions or individuals with unusual circumstances

If an individual is required to file a 2016 IRS income tax return and has been granted a filing extension **beyond** the automatic six-month extension by the IRS, provide the following documents:

* A copy of the 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 2016; and
* A copy of the IRS's approval of an extension beyond the automatic six-month extension for the tax year 2016
* 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, 2017
* A copy of IRS Form W–2 for each source of employment income received for tax year 2016 and, if self-employed, a signed statement certifying the amount of the individual’s AGI and the U.S. income tax paid for tax year 2016.
* After filing a 2016 IRS income tax return, use the ISR DRT or submit a IRS Tax Return Transcript

### 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 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 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 account information 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 income tax return that was filed with the relevant tax authority.