

# 2019-2020 Dependent Verification Worksheet

## WHAT YOU MUST DO BEFORE FINANCIAL AID CAN BE AWARDED TO YOU

**Important Note:** The instructions below apply to each parent included in the household. Notify The financial aid office if the parents 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 parents filed or will file a 2017 IRS income tax return(s). *The best way to verify income is by using the 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 by the FAFSA filer.

### 3. Check the box that applies:

- ☐ The parents **have used** the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student's FAFSA.
- ☐ The parent(s) **have not 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 parents are *unable or choose 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 Tax return transcript** may be obtained through:

- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click “Get a tax transcript.” 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), under the Tools heading, click “Get a tax Transcript.” 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. Transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If your parents 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.

**A. Student Information (Please print)**

			Student ID#
Last Name	First Name	M.I.	Social Security #
Address (include apt. #)		City	State Zip Code
Date of Birth	E-mail Address		Phone Number with area code

**B. Family Information**

Number of Household Members: List below the people in your parents' household.  
Include:

- ❖ The Student
- ❖ Your parents (including a stepparent) listed on the FAFSA.
- ❖ The parents' other children if the parents will provide more than half of the children's support from July 1, 2019, through June 30, 2020, or if the other children would be required to provide parental information if they were completing a FAFSA for 2019-2020. Include children who meet either of these standards, even if a child does not live with the parents.
- ❖ Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's 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, and include the name of the college.

If more space is need, 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)
		Self		

**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.

### C. Tax Return Non filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2017 income tax return with the IRS.

**Check the two boxes that applies:**

☐ Both Parent was unemployed and neither had income earned from work in 2017.

☐ One or both parents 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 or an equivalent document is provided. (Provide copies of all 2017 IRS W-2 forms issued to the parents by their 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 your name and ID number at the top.*

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2017
	Total Amount of Income Earned From Work	\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority.

\_\_\_\_\_ Check here if confirmation of nonfiling is provided.

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

### D. Additional Income

Both tax filers and non-tax filers must list any untaxed income received in 2017. Be sure to enter zeros if no funds were received. **Failure to complete this section will delay the processing of your verification.**

Applicants with no taxable income, no earned income or no untaxed income as reported in Section D will be required to submit a **Low Income Document form and letter** explaining how living expenses were met.

Calendar Year 2017	Parent	Student
Untaxed portion of pensions.	\$	\$
Untaxed portion of IRA Distributions	\$	\$
Tax exempt interest income	\$	\$
Education credits from 1040 or 1040A.	\$	\$
IRA Distributions	\$	\$
IRA Deductions and Payments	\$	\$

### **E. Sign this Worksheet**

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

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Student's Signature

Date

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Parent's Signature

Date

**Return by mail, email or fax to:**

**Faulkner University Financial Aid Office  
5345 Atlanta Hwy  
Montgomery, AL 36109**

**FAX: (334) 386-7201**

**E-MAIL - [Faid@faulkner.edu](mailto:Faid@faulkner.edu)**

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