2018-2019 Independent Verification Worksheet

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

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 2016 or had a change in marital status after December 31, 2016.

Instructions: Complete this section if the student and spouse filed or will file a 2016 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 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

1. Check the box that applies:

☐ The student **has used** the IRS DRT in *FAFSA on the Web* to transfer 2016 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 2016 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 **2016 IRS Tax Return Transcript(s).**

A **2016 Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to 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, 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. The transcript is generally received with 10 business days from the IRS's receipt of the paper request form.

If the student and spouse filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Transcript(s)** must be provided for each.

_____ Check here if a 2016 IRS Tax Return Transcript(s) is provided.
_____ Check here if a 2016 IRS Tax Return Transcript(s) will be provided later.

A. <u>Student Information (Please print)</u>

				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. <u>Family Information</u>

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

List below the people in the <u>student's household</u>. 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, 2018, through June 30, 2019, even if a child does 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 person's support, and will continue to provide more than half of that person's support through June 30, 2019.

Number in College: Include in the space below information about any household member who is, or will be, enrolled <u>at least half time</u> in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2018 and Jun 30, 2019, and 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 Attending in 2018-2019	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 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 2016 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 2016.

☐ The student and/or spouse were employed in 2016 and have listed below the names of all employers, the amount earned from each employer in2016, and whether an IRS W-2 form or an equivalent document is provided. (Provide copies of all 2016 IRS W-2 forms issued to the student and spouse by their employees). 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 Yes or No	Annual Amount Earned In 2016
	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 2016 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 2016. 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 2016	Student	Spouse
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 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.

____

Student'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

Revised 10/25/17