

# 2020-2021 Independent Verification Worksheet

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

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**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](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2018 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 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 a **2018 IRS Tax Return Transcript(s)**.

A **2018 Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to [www.irs.gov](https://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](https://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 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 IRS Tax Transcript(s)** must be provided for each.

\_\_\_\_\_ Check here if a 2018 IRS Tax Return Transcript(s) is provided.

\_\_\_\_\_ Check here if a 2018 IRS Tax Return Transcript(s) will be provided later.

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

Faulkner 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 and Number in College  
(Independent Student)**

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 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, 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 Jun 30, 2021, 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.

Relationship	Full Name	Age	College Attending in 2020-2021	Will be Enrolled at Least Half Time (Yes or No)
Your Name				
Spouse				
Dependent				
Dependent				
Other				

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**

**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.** The instructions and certifications below apply to the student and spouse, if the student is married.

**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 or an equivalent document is provided. (Provide copies of all 2018 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 2018
	Total Amount of Income Earned From Work	\$

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.

\_\_\_\_\_ 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 2018. 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 2018	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.

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**Student Signature**

**Date**

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

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

**QUESTIONS:**

**PHONE: (334) 386-7195**

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

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

Revised 11/18/19