



2019-2020 Verification Worksheets For Independent Students V-1 Standard Verification Group

Your 2019-2020 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 and spouse (if married) reported on your FAFSA. To verify that you provided correct information we 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, by signing this form you are giving WVSU financial aid office permission to update your FAFSA with the correct information. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid office. **Complete all sections of this form applicable to you. Incomplete forms or forms without the requested documentation will not be processed. Based on your answers we may need to request additional documentation.**

A. 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 A# |

Independent Student's Family Information from July 1, 2019 - June 30, 2020

List below the people in your household including yourself, spouse, children, etc., even if everyone does not live in one house. List only those for whom you provide at least 50% of their support. Also indicate any household member that will be attending a college/university.

| Full Name | Age | Relationship | College Attending, if any | Will be Enrolled at Least Half Time |
|------------------------------|-----------|---------------|---------------------------|-------------------------------------|
| <i>Missy Jones (example)</i> | <i>18</i> | <i>Sister</i> | <i>Central University</i> | <i>Yes</i> |
| | | <i>self</i> | | |
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B. Student Information

Section 1: Students Who Filed 2017 Taxes ONLY (Please skip to Section 2 if student did not file taxes)

2017 Tax Return Transcript

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 2017 or had a change in marital status after December 31, 2017.

Instructions: Complete this section if the student and spouse filed or will file a 2017 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 by the FAFSA filer.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2017 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 2017 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 **2017 IRS Tax Return Transcript(s)**.

A **2017 IRS 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 within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse 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.



Verification of 2017 Income Information for Individuals with Unusual Circumstances Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2017 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2017, must provide:

- A copy of 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 2017;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2017;
- 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, 2018;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2017 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 2017.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2017 must provide:

- A **2017 IRS Tax Return 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; *or*
- IRS DRT information on an ISIR record with all tax information from the original tax return, **and**
- A signed copy of the 2017 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

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 DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **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.



Section 2: Students Who Did Not File 2017 Taxes ONLY

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 2017 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 2017.
- The student and/or spouse 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 student and spouse 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 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 2017 |
|---|---|------------------------------|
| <i>(Example) ABC's Auto Body Shop</i> | <i>Yes</i> | <i>\$4,500.00</i> |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority.

- ___ Check here if confirmation of non-filing is provided.
- ___ Check here if confirmation of non-filing will be provided later.

Note: We may require you to provide documentation from the IRS that indicates a 2017 IRS income tax return was not filed with the IRS.



WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

C. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

Student's Signature

Date

Spouse's Signature (If Independent and married)

Date

**Return to: West Virginia State University
Office of Student Financial Assistance
125 Ferrell Hall
PO Box 1000
Institute, West Virginia 25112**