

# 2019–2020 Verification Worksheet

## Dependent Student – V5

Your 2019–2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. To verify that you provided correct information, the financial aid administrator at your school 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. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

### A. Dependent Student’s Information

Student’s Last Name	Student’s First Name	Student’s M.I.	Student’s ID 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’s Alternate or Cell Phone Number

### B. Dependent Student’s Family Information

List below the people in your parent(s) household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don’t live with your parent(s). Exclude a parent who is not living in the household because of separation or divorce.
- Your parent(s)’ other children if your parent(s) will provide more than half of their 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 they do not live with your parent(s).
- Other people if they now live with your parent(s), and your parent(s) 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.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2019 and June 30, 2020. *If more space is needed, attach 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
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

### C. Dependent Student's Income Information to Be Verified

**1. TAX RETURN FILERS— Complete this section only if the student, filed or will file a 2017 income tax return with the IRS.**

*The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. For instructions on how to use the IRS Data Retrieval Tool or request a Tax Return Transcript, please see the last page. Please note that the school cannot complete the verification until the IRS information has been received.*

**Check the box that applies:**

- The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2017 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2017 IRS income information into the student's FAFSA once the student has filed a 2017 IRS tax return.
- The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2017 IRS tax return transcript**—not a photocopy of the income tax return.
  - Check here if the student's IRS tax return transcript is attached to this worksheet.
  - Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

- **Important Note:** If the student filed, or will file, an amended 2017 IRS tax return, the student must submit a signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

**2. TAX RETURN NONFILERS— Complete this section only if the student will not file and is not required to file a 2017 income tax return with the IRS.**

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2017.
- The student did not file taxes but was employed in 2017 and has listed below the names of all the student's employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is attached. Attach copies of all 2017 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and ID number at the top.*

Employer's Name	2017 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

### D. Parent's Income Information to Be Verified

Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

**1. TAX RETURN FILERS— Complete this section only if the student's parent(s) filed or will file a 2017 income tax return with the IRS.**

*The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. For instructions on how to use the IRS Data Retrieval Tool or request a Tax Return Transcript, please see the last page. Please note that the school cannot complete the verification until the IRS information has been received.*

**Check the box that applies:**

- The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2017 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2017 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed.
- The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2017 IRS tax return transcript(s)**—not photocopies of the income tax return.
  - Check here if an IRS tax return transcript(s) is attached to this worksheet.
  - Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

- **Important Note:** If the parent filed, or will file, an amended 2017 IRS tax return, the parent must submit a signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

**2. TAX RETURN NONFILERS—Complete this section only if the student's parent(s) will not file and is not required to file a 2017 income tax return with the IRS.**

**Check the box that applies:**

- The parent(s) was not employed and had no income earned from work in 2017.
- The parent(s) did not file taxes but was employed in 2017 and has listed below the names of all the parent's employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is attached. Attach copies of all 2017 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and ID number at the top.*

Employer's Name	2017 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

Parent(s) must also 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 nonfiling is provided.
- \_\_\_\_ Check here if confirmation of nonfiling will be provided later.

### E. High School Completion Status

Provide one of the following documents to indicate the student's high school completion status when the student begins college in 2019–2020:

- A copy of the student's high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

### F. Certification and Signatures

**IMPORTANT:** To avoid a delay in processing, please review to make sure that every question has been answered and that you have provided all requested items. Additional information may be requested upon review of the initial documents submitted.

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

**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

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

*Do not mail this worksheet to the U.S. Department of Education.*

*Please complete and return all pages to  
Wagner College  
Office of Financial Aid  
One Campus Road  
Staten Island, NY 10301*

*You should make a copy of this worksheet for your records.*

**DO NOT EMAIL THIS FORM UNLESS IT IS ENCRYPTED AND PASSWORD PROTECTED.**

**Identity and Statement of Educational Purpose**  
**(To Be Signed at the Institution)**

The student must appear in person at \_\_\_\_\_ to  
(Name of Postsecondary Educational Institution)

verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational  
(Print Student's Name)  
Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending \_\_\_\_\_ for 2019–2020.  
(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature) (Date)

\_\_\_\_\_  
(Student's ID Number)

**Identity and Statement of Educational Purpose**  
**(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at \_\_\_\_\_ to verify his or her identity,  
(Name of Postsecondary Educational Institution)  
the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_  
City/County of \_\_\_\_\_  
On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Notary's name)  
personally appeared, \_\_\_\_\_, and provided to me  
(Printed name of signer)  
on basis of satisfactory evidence of identification, \_\_\_\_\_,  
(Type of government-issued photo ID provided)  
to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

\_\_\_\_\_  
Notary signature & date

\_\_\_\_\_  
Commission Expiration Date

## Instructions for Providing Tax Data for Verification:

There are two ways that families can elect to provide their tax information for the purposes of Verification. If you are eligible to do so, the preferred method is to use the **IRS Data Retrieval Tool**. This tool links the information on your tax return to the FAFSA. Please note that if you recently filed your taxes or if you currently have an unpaid balance with the IRS, the retrieval tool may not be available to you.

Alternatively, families who are unable to use the Data Retrieval Tool may **contact the IRS to order a Tax Return Transcript**. You can request the transcript online, over the phone, or in person at your local IRS branch. Please be sure to request the "Tax Return Transcript" and not the "Tax Account Transcript" when communicating with the IRS.

Please note that IRS data is available approximately two weeks after filing taxes electronically or eight weeks after mailing a paper return.

## Instructions for Using the IRS Data Retrieval Tool

- Go to [www.FAFSA.gov](http://www.FAFSA.gov)
- Log into the student's FAFSA.
- Select "Make FAFSA Corrections."
- Under the Financial Information sections, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool.
- You will be redirected to the IRS website to authorize the transmittal.
- Be sure to save and submit the updated FAFSA.

## Instructions for ordering a Tax Return Transcript

- Go to [www.IRS.gov](http://www.IRS.gov) or call 1-800-829-1040.
- Select "Get your tax record."
- You may opt to "Get Transcript Online" or "Get Transcript by Mail."
- You will need your social security number, date of birth, and the address on file with the IRS.
- You will need to request the "Tax Return Transcript." Do not select "Tax Account Transcript."
- If you select "Get Transcript by Mail," it may take 5-10 calendar days for you to receive the transcript.