

# 2019-2020 Verification Worksheet



Your FAFSA was selected for a review process called “verification”. The Department of Education randomly selects the FAFSA’s chosen for verification; they are not chosen by Trine University. Because Trine University administers federal financial aid programs we are required to request, collect, and verify information submitted through the FAFSA and adjust or cancel aid accordingly. It is the student’s responsibility to comply in a timely manner with all requests for documentation. Trine does not take responsibility for changes made to financial aid when paperwork is submitted late. For an accurate bill it is best to submit the requested paperwork as soon as you are able to. Every time you submit a FAFSA you have a chance of being selected for verification.

## **STEP 1 – STUDENT INFORMATION**

<i>Student Last Name</i>	<i>Student First Name</i>	<i>XXX-XX- Social Security Number</i>	<i>Student ID</i>
<i>Permanent Home Address</i>		<i>City/State/Zip</i>	<i>Date of Birth</i>
<i>Cell Phone (Include Area Code)</i>	<i>Permanent Home Phone (Include Area Code)</i>	<i>Email Address</i>	

## **STEP 2 – FAMILY INFORMATION (Please list the people in your household)**

If you are a **dependent student**, include:

- Yourself
- Your parent(s) (including step-parents)
- Your parent(s) other dependent children if a) your parent(s) will provide more than half of their support from July 1, 2019 through June 30, 2020, or b) the child completes a FAFSA with parental information.
- Other people only if they now live in your parent’s household and your parents will provide more than half of their support from July 1, 2019 through June 30, 2020.

If you are an **independent student**, include:

- Yourself
- Your spouse (if you are married)
- Your or your spouse’s children if you will provide more than half of their support from July 1, 2019 through June 30, 2020 even if they don’t live with you.
- Other people only if they live in your household and you provide more than half of their support and will continue to do so from July 1, 2019 through June 30, 2020.

Full Name	Age	Relationship to student	Name of College/Degree Program (If at least half-time for 2019-2020)
<i>Sally Student(Example)</i>	<i>19</i>	<i>Self</i>	<i>Trine University - Business Administration</i>

(Add another sheet if needed)

## **STEP 3 – STUDENT TAX & INCOME INFORMATION – CALENDAR YEAR 2017**

Did you, the student, have earnings from a Co-op in 2017?     Yes     No

**Check the appropriate box below and provide the requested information and/or documents:**

- I used the IRS Data Retrieval Tool to transfer my 2017 income tax return information to the FAFSA and made no further changes to the information.
- I did not (or could not) transfer my 2017 income tax return information to the FAFSA using the IRS Data Retrieval. I will provide a copy of my 2017 IRS Tax Return Transcript. *(Only use if the IRS Data Retrieval failed to load properly).*

**More options continued on next page**

Student's Name: \_\_\_\_\_ SSN: XXX-XX-\_\_\_\_\_

**STEP 3 CONTINUED – STUDENT TAX & INCOME INFO–CALENDAR YEAR 2017**

Your Tax Return Transcript can be obtained by mail from the IRS using Form 4506-T and completing line 6 and checking box 6a. It may also be requested online at [irs.gov](http://irs.gov) using “Get Transcript” and selecting transcript type: “Return Transcript”.

\_\_\_\_ Check here if Tax Return Transcript is attached.  
 \_\_\_\_ Check here if Tax Return Transcript will be provided later. *(Typically requires 2 weeks or less).*

- I filed an Amended 2017 IRS Tax Return.  
 \_\_\_\_ Check here if Signed copy of 1040X Amended Tax Return and Signed Tax Return Transcript are attached.  
 \_\_\_\_ Check here if Signed copy of 1040X Amended Tax Return and Signed Tax Return Transcript will be provided later. See above for details about obtaining Tax Return Transcript.
- I was not employed and did not have income earned from work in 2017.
- I was employed, but not required to file a 2017 Federal Income Tax Return (two items required).

1) Complete the chart below to list the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. List every employer even if the employer did not issue an IRS W-2 form.

<b>Fill out the below chart only if you did <u>not</u> file taxes, but <u>had</u> earned income from work</b>		
Employer’s Name	2017 Amount Earned	IRS W-2 Attached?
<i>(example) Suzy’s Auto Body Shop</i>	<i>\$2,000.00</i>	<i>Yes</i>
<b>Total Amount of Income Earned from Work</b>		

- 2) Provide documentation from the IRS that indicates a 2017 IRS income tax return was not filed.
- This documentation from the IRS or other relevant tax authority must be dated on or after October 1, 2017 and indicate a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority (e.g., a US territory or foreign government). This can be obtained by mail from the IRS using Form 4506-T and checking box 7.
- \_\_\_\_ Check here if Confirmation of Non-filing is attached.  
 \_\_\_\_ Check here if Confirmation of Non-filing will be provided later. *(Typically requires 2 weeks or less).*

**STEP 4 – SPOUSE OR PARENT TAX & INCOME INFORMATION –CALENDAR YEAR 2017**

**Check the appropriate box below and provide the requested information and documents:**

- My spouse/parent(s) used the IRS Data Retrieval Tool to transfer the 2017 income tax return information to the FAFSA and made no further changes to the information.  
**Important Note:** *If the spouse/parents filed separate 2017 IRS income tax returns, the IRS Data Retrieval Tool cannot be used and the 2017 IRS Tax Return Transcript(s) must be provided for each person separately (see next option).*
- My spouse/parent(s) did not (or could not) transfer the 2017 income tax return information to the FAFSA using the IRS Data Retrieval. I will provide a copy of the 2017 IRS Tax Return Transcript(s). *(Only use if the IRS Data Retrieval failed to load properly).*  
 This can be obtained by mail from the IRS using Form 4506-T and completing line 6 and checking box 6a. It may also be requested online at [irs.gov](http://irs.gov) using “Get Transcript” and selecting transcript type: “Return Transcript”.  
 \_\_\_\_ Check here if Tax Return Transcript(s) is attached.  
 \_\_\_\_ Check here if Tax Return Transcript(s) will be provided later. *(Typically requires 2 weeks or less).*

**More options continued on next page**

**STEP 4 CONTINUED – SPOUSE OR PARENT TAX & INCOME INFO–CALENDAR YEAR 2017**

- My spouse/parent(s) filed an Amended 2017 IRS Tax Return.
  - \_\_\_\_ Check here if Signed copy of 1040X Amended Tax Return and Signed Tax Return Transcript are attached.
  - \_\_\_\_ Check here if Signed copy of 1040X Amended Tax Return and Signed Tax Return Transcript will be provided later. See above for details about obtaining Tax Return Transcript.
- My spouse/parent(s) were not employed and did not have income earned from work in 2017.
- My spouse/parent(s) were employed, but not required to file a 2017 Federal Income Tax Return (two items required).
  - 1) Complete the chart below to list the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. List every employer even if the employer did not issue an IRS W-2 form.

Fill out the below chart only if you did <u>not</u> file taxes, but <u>had</u> earned income from work		
Employer's Name	2017 Amount Earned	IRS W-2 Attached?
<i>(example) Suzy's Auto Body Shop</i>	\$2,000.00	Yes
<b>Total Amount of Income Earned from Work</b>		

- 2) Provide documentation from the IRS that indicates a 2017 IRS income tax return was not filed.
 

This documentation from the IRS or other relevant tax authority must be dated on or after October 1, 2018 and indicate a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority (e.g., a US territory or foreign government). This can be obtained by mail from the IRS using Form 4506-T and checking box 7.

  - \_\_\_\_ Check here if Confirmation of Non-filing is attached.
  - \_\_\_\_ Check here if Confirmation of Non-filing will be provided later. *(Typically requires 2 weeks or less).*

**STEP 5 – CERTIFICATION**

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

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

---

<i>Student Signature</i>	<i>Date</i>	<i>Student Name</i>
<i>Parent Signature (If student is dependent)</i>	<i>Date</i>	<i>Parent Name (If student is dependent)</i>
<i>Spouse Signature (If student is married)</i>		<i>Spouse Name (If student is married)</i>

**Questions?**

<b>Trine University</b>	<b>Main Campus</b>	<b>CGPS</b>
Financial Aid Office	800-347-4878 option 3	877-294-4878
1 University Ave	260-665-4511 fax	260-665-4511 fax
Angola, IN 46703		