

DeSales University

2020-2021 Verification Worksheet

Your FAFSA was selected by the US Department of Education for a review process called "Verification". Verification must be completed before your financial aid can be finalized and before any aid will be credited to your student account. If there are differences between your FAFSA and this information, we will update your FAFSA, recalculate your aid eligibility and send a revised financial aid package.

Instructions:

Please complete ALL applicable sections of this worksheet, attach requested documentation, sign and return to the Financial Aid Office. Incomplete worksheets will not be processed. Verification cannot be completed until all requested documents are received and reviewed.

A. STUDENT INFORMATION

Student Name: _____ SSN: _____

Permanent Address: _____

City: _____ State: _____ Zip Code: _____

Phone/Cell #: _____ Email: _____

Marital Status: _____ Unmarried _____ Married _____ Separated _____ Divorced

B. STUDENT TAX/INCOME INFORMATION

- TAX RETURN FILERS**—Complete this section if the student, filed or will file a 2018 income tax return with the IRS. Important Note: If the student filed, or will file, an amended 2018 IRS tax return, the student must contact the financial aid administrator before completing this section.

Check the box that applies:

- The student has used the IRS Data Retrieval Tool (DRT) in FAFSA on the Web to retrieve and transfer 2018 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- 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 2018 IRS tax return transcript or a **signed** copy of the 2018 tax return and 2018 W2's.
- Check here if the student's 2018 IRS tax return transcript or a **signed** copy of the 2018 tax return and 2018 W2's is attached to this worksheet.
- Check here if the student's 2018 IRS tax return transcript or a **signed** copy of the 2018 tax return and 2018 W2's will be submitted to the student's school later.
- Check here if the student didn't earn any income, or was employed, but **not required to file a federal tax return**. Please provide copies of all 2018 W2's issued by the employer (if applicable) and complete the Source of Income table (**Independent Students Only**).

C. PARENT TAX/INCOME INFORMATION (Dependent Student Only)

- TAX RETURN FILERS**—Complete this section if the student's parent(s) filed or will file a 2018 income tax return with the IRS. Important Note: If the student's parent(s), filed or will file, an amended 2018 IRS tax return, the student's financial aid administrator must be contacted before completing this section.

Check the box that applies:

- The student's parent has used the IRS Data Retrieval Tool (DRT) in FAFSA on the Web to transfer 2018 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.

- 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 2018 IRS tax return transcript(s) or a **signed** copy of the 2018 tax return and 2018 W2(s).
- Check here if a copy of the parent’s 2018 IRS tax return transcript(s) or a **signed** copy of the 2018 tax return and 2018 W2(s) is attached to this worksheet.
- Check here if a 2018 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.

TAX RETURN NON-FILERS – Independent students and Parents of Dependent students, please provide your source of income. If you were employed, but not required to file a federal tax return, please attach the **verification letter from the IRS**, and copies of all 2018 IRS W-2 forms issued by the employer.

Please list annual amounts from all sources and earnings. Check the box that applies:

- Independent student reported on the FAFSA and if the student is married, for both student and spouse.
- Parent(s) of dependent student for the time period of **January 1, 2018 through December 31, 2018**.

Source of Income	Amount
Wages: Independent Student/Parent of Dependent Student	
Wages: Student’s Spouse/Parent of Dependent Student Spouse	
Payments to tax-deferred pension/saving plans (paid directly or withheld from earnings)	
Payments to an IRS/Keogh Plan	
Child Support Received	
Tax exempt Interest Income	
Untaxed portion of IRA distributions	
Untaxed portion of pensions	
Housing, food, and other living allowances for military, clergy, and others (include cash)	
Veteran’s non-educational benefits, such as Death Pension, Dependency, Indemnity etc.	
Other Untaxed Income not reported on tax return: Disability benefits, Workers compensation, etc.	
Money received or paid on your behalf not reported elsewhere on this form. This includes money received from a parent or other person whose financial information is not reported on this form and not part of a legal child support agreement.	
TOTAL UNTAXED INCOME FOR 2018	

Check all programs below from which you received assistance in 2018:

<input type="checkbox"/> Medicaid	<input type="checkbox"/> SNAP benefits
<input type="checkbox"/> Untaxed Social Security including SSI	<input type="checkbox"/> “Welfare” (TANF)
<input type="checkbox"/> Free/Reduced Price School Lunch program	<input type="checkbox"/> WIC benefits

A 2018 IRS Tax Return Transcript or Verification of Non-Filer letter may be obtained through:

- **Get Transcript ONLINE** – Go to www.irs.gov. Click “Get Your Tax Record”. Click “Get Transcript ONLINE”. Make sure to request the “**Tax Return Transcript**” and **NOT** the “Tax Account Transcript”. If you are a Non- Filer, request “Verification of Non-Filing Letter”.
- **Get Transcript in PERSON** – Go to www.irs.gov, at bottom of page and Click “Contact Your Local Office.” Click on Blue Box “Taxpayer Assistance Center Office Locator”, enter Zip Code and Search.
- **Get Transcript by MAIL** – Go to www.irs.gov. Click “Get Your Tax Record”. Click “Get Transcript by MAIL”. Make sure to request the “**Tax Return Transcript**” and **NOT** the “Tax Account Transcript”. If you are a Non-Filer, request “Verification of Non-Filing Letter”.
- **Automated Telephone Request** – 1-800-908-9946
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T

D. HOUSEHOLD INFORMATION

Write the names and ages of all household members. **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 June 30, 2021, include the name of the college.

Dependent Students: List the persons in your parent's household*; include:

- The student
- The parent(s) (including stepparent)
- The parents' other children, if the parents provide more than half of their support from July 1, 2020 and June 30, 2021, or the other children would be required to provide parental information if completing a FAFSA for 2020 - 2021. Include children who meet either of these standards, even if a child does not live with the parents
- other people if they now live with the parents and the parents 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, 2021.

Independent Students: List the persons in student's household*; include:

- The student
- The student's spouse, if married
- The student's or spouse's children, if the student or spouse provides more than half of their support from July 1, 2020 through June 30, 2021
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of other person's support, and will continue to provide more than half of that person's support from July 1, 2020 through June 30, 2021.

Full Name	Age	Relationship	Name of College (if currently enrolled)	If in College, is enrollment at Least Half Time? (Yes or No)
		<i>Self</i>		

*If more space is needed, provide a separate page with the student's name and ID number at the top.

*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.

I hereby certify that all statements and information provided on the application are complete and correct. I understand it is a Federal crime to purposefully give false or misleading information on this form and may be subject to a fine, imprisonment, or both.

Dependent student -- The student **AND** one parent, whose information was reported on the FAFSA, must sign and date.

STUDENT SIGNATURE: _____ DATE: _____

(Required)

PARENT'S SIGNATURE: _____ DATE: _____

(Required)

Independent student – Must sign as the student. If married, spouse's signature is optional.

STUDENT SIGNATURE: _____ DATE: _____

(Required)

SPOUSE'S SIGNATURE: _____ DATE: _____

(Optional)