

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. We are required by law to review selected FAFSA applications with actual tax documentation before disbursing federal student aid. If there are differences, your FAFSA information may need to be corrected. Complete ALL sections of this worksheet, attach all required tax documentation, and return to the Financial Aid Office promptly. Incomplete forms and missing tax documents will delay processing. Once verification is completed, there may or may not be changes to your financial aid award. You will be notified of any changes. **Failure to comply with this request will result in federal/state award(s) being cancelled.**

**A. Student Information**

Last Name	First Name	MI	Student ID or SSN #
Address (include apt. #)			Date of Birth
City	State	Zip Code	Phone Number

**B. Household and College Information**

Number of Household Members: List below the people in your parents' household. Include:

- You and your parent(s) (including stepparent) that you listed on the FAFSA even if you don't live with your parent(s).
- Your parent(s) other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2020, through June 30, 2021, or (b) the children would be required to provide parental information when completing a FAFSA for 2020-2021.
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.

Write the names of all household members. Also write in the name of the college for any household member, excluding your parent(s), who will be attending college at least half-time between **July 1, 2020 and June 30, 2021**, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be enrolled at least half-time (Yes or No)
Jane Doe (example)	18	Self	University of Charleston	Yes

**Instructions for Sections C and D**

**Tax Filers:** The best and preferred way to verify your 2018 tax information is by using the IRS Data Retrieval Tool (DRT) within the FAFSA. For security and privacy, all information transferred from the DRT feature will be masked, and students and parents will see "Transferred from the IRS." Follow the instructions to determine if you are eligible to use the DRT to transfer 2018 IRS income tax information into the FAFSA. For parents who file separate 2018 IRS income tax returns, the DRT cannot be used, and the tax information will be entered manually exactly as it appeared on your tax return.

If you were unable to use the DRT at the time the FAFSA was filed, you may provide a copy of the **2018 IRS Tax Return Transcript(s) for each tax filer**. If parents are married, or unmarried and living together, and filed separate returns, tax transcripts are required for each parent. If a tax return transcript is unavailable, please contact the financial aid office for more information.

A **2018 IRS Tax Return Transcript** may be obtained through the following methods:

- **Online Request** – [www.irs.gov](http://www.irs.gov) -> "Get My Tax Record" -> "Get Transcript Online" or "Get Transcript by Mail."
- **Telephone Request** – 1.800.908.9946 -> Request an IRS Tax Return Transcript, (**NOT** the IRS Tax Account Transcript).
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T

**Amended Tax Returns:** If you or your parent(s) filed an amended 2018 IRS income tax return (1040X), submit a signed copy in addition to a 2018 tax return transcript.

**Tax Extensions:** If you or your parent(s) filed a tax extension for 2018 and have not yet filed, please contact our office for next steps.

**Parent Non-Tax Filers:** If your parent(s) did not, will not, and were not required to file a 2018 IRS income tax return, **request and attach a copy of your parent(s) 2018 IRS Verification of Non-Filing Letter**. To obtain a 2018 verification non-filing letter, go to [www.irs.gov](http://www.irs.gov), select "Get My Tax Record," click "Get Transcript Online." **Attach copies of any 2018 W-2(s) of the non-tax filer.**

**C. Parent Income Information:** Check the box that applies.

- My parent(s) income was reported on my FAFSA using the IRS Data Retrieval Tool. Date DRT was used \_\_\_/\_\_\_/\_\_\_.
- My parent(s) filed a 2018 IRS income tax return but could not use the IRS DRT. Attached is a copy of the 2018 IRS tax return transcript(s).
- My parent(s) did NOT work, did not and were not required to file a 2018 income tax return.
- My parent(s) did NOT and were not required to file an IRS tax return BUT earned income in 2018. Complete the following chart and attach applicable 2018 W-2(s).

Parent Source of Income for Non-Tax Filers	2018 Amount Earned	W-2 Attached (Yes or no)

**D. Student Income Information:** Check the box that applies.

- My income was reported on my FAFSA using the IRS Data Retrieval Tool. Date DRT was used \_\_\_/\_\_\_/\_\_\_.
- I filed a 2018 IRS income tax return but unable use the DRT. Attached is a copy of my 2018 IRS tax return transcript(s).
- I did NOT work, did not and was not required to file a 2018 IRS income tax return.
- I did NOT, and was not required to file an IRS return, BUT earned income in 2018. Complete the following chart and attach applicable 2018 W-2(s).

Student Source of Income for Non-Tax Filers	2018 Amount Earned	W-2 Attached (Yes or no)

**E. Certification and Signatures**

Each person signing this document certifies that all information reported on this form and any attachments to this form are complete and accurate. The student and parent **must** sign and date.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date