

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 household. Include:

- Yourself
- Your spouse (if married)
- Your children, IF any, and if you will provide more than half of their support from July 1, 2020, through June 30, 2021, even if the child does not live with you.
- Other people IF they now live with you and you 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 the name of the college for any household member who will be enrolled, at least half-time in a degree or certificate program at an eligible postsecondary educational institution between **July 1, 2020 and June 30, 2021**. If more space is needed, 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 Section C

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 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. Married students 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. Do this for both student and spouse, if applicable.

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 you are married, or unmarried and living together, and filed separate returns, tax transcripts are required. 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 -> “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 and/or your spouse 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 and/or your spouse, if married filed a tax extension for 2018 and have not yet filed, please contact our office for next steps.

Non-Tax Filers: If you and/or your spouse, if married, did not, will not, and were not required to file a 2018 IRS income tax return, **request and attach a copy of you and/or your spouse’s 2018 IRS Verification of Non-Filing Letter**. To obtain a 2018 verification non-filing letter, go to 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. **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 could not use the DRT. Attached is a copy of my 2018 IRS tax return transcript.
- 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)

D. **High School Completion Status:** You must submit documentation of high school completion or its equivalent. Check the box of the document you will attach to this worksheet:

- Copy of the student’s high school diploma.
- 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 the student after passing a State-authorized exam (GED test, HiSET, TASC or other State-authorized exam) that the State recognizes as the equivalent of a high school diploma.
- Academic transcript of a successfully completed two-year program acceptable for full credit toward a bachelor’s degree.
- For students who completed secondary education in a foreign country, a copy of the Secondary School Leaving Certificate or other similar document.
- For a homeschooled student in a state where the law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a homeschooled student in a state where state law does NOT require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript, 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.

E. Identity and Statement of Educational Purpose

The student will need to appear in person at the Financial Aid Office and present a government issued picture ID (such as a driver's license, military ID, or passport) together with this completed verification worksheet. A Financial Aid representative will validate the statement below at the time of submission by maintaining a copy of your photo ID and by providing a signature and date. ***If you cannot appear in person to submit this worksheet, you will need to provide a copy of your government issued ID and this worksheet notarized by a public notary.***

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose and that the
(Print Student's Name)

Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending

The University of Charleston for 2020-2021.

Student's Signature Date

Financial Aid Rep. Signature Date

Notary's Certificate of Knowledge (If you cannot appear in person)

State of _____ City/County of _____ on _____

Before me, _____ personally appeared, _____
(Notary's Name) (Printed name of signer)

And provided to me on a 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 expires)

F. 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.

Student Signature Date

Spouse Signature (optional) Date