

2020-2021 Verification Worksheet

WEST TEXAS A&M UNIVERSITY
FINANCIAL AID

WTAMU Box 60939, Canyon, TX 79016

Phone: 806-651-2055 FAX: 806-651-2924 Email: financial@wtamu.edu

Your 2020-2021 FAFSA was selected for review in a process called verification. By law, before awarding Federal Student Aid, we must have you confirm the information you reported on your FAFSA. In this process, we will compare your FAFSA with the information on this worksheet along with copies of your (and spouse's or parents') **2018 W2s** and any other required documents. If there are differences, your FAFSA information may be corrected. You (and at least one parent if you are a dependent) must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. Complete this form promptly so that your financial aid is not delayed.

A. Student's Information

Student's Last Name Student's First Name Student's M.I. Student's Buff ID Number

Student's Phone Number (include area code) Student's Alternate or Home Phone Number

■ **DEPENDENT** – List below the people in your parents' household even if you do not live with your parents, and include:

- yourself **and** your parent(s) (including stepparent),
- **and** your parents' other children even if they do not live with your parents, if they are under 24 years of age and either (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 if they were completing a 2020-2021 FAFSA.
- **and** other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.

■ **INDEPENDENT** - List below the people in your (the student's) household, and include:

- yourself, **and** your spouse if married,
- **and** your or your spouse's children, if you or your spouse will provide more than half of their support from July 1, 2020 through June 30, 2021 even if a child does not live with you,
- **and** other people if they now live with you, and you or your spouse currently provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.

Per instructions above, list the names of **ALL** household members and their date of birth, age and relationship to you. *If you need more space, attach a separate page with the student's name and Buff ID at the top.*

Full Name	Date of birth	Age	Relationship	Will this person be enrolled at least half-time in a degree, diploma or certificate program? (Yes/No)
			Self	

With few exceptions, state law gives you the right to request, receive, review and correct information about yourself collected on this form.

_____ Student signature

_____ Parent signature

Student's Name: _____ Buff ID # _____

B. Student's Income Information

- ❖ List in the box below **all 2018 income** earned by you (and, if married, your spouse) including W2 income, self-employment income, farm income, and/or income reported on Schedule E on the tax return. Notify our office if you had a change in marital status after December 31, 2018.

Employer's Name	2018 Amount Earned	IRS W2 Income?	Self-Employment Income?	Farm Income?	Rental Prop or Partnership Income?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$1500.00(example)</i>		<i>Yes(example)</i>		

- ❖ **Also submit the following documents:**

- ALL W2s and 1099s for income earned from work (can substitute 2018 Wage and Income Transcript obtained from the IRS)
- Schedule C for Self-Employment income or loss
- Schedule E for Rental Real Estate, Royalties, Partnerships, S Corps, Estates, Trusts, etc.
- Schedule F for Farm income or loss

1. If you filed or will file a 2018 tax return (or you are currently married and your spouse filed or will file a 2018 tax return). If no 2018 tax return was filed, skip to Section 2 below.

- If a tax return was filed or will be filed, to complete verification we **require** either the IRS Data Retrieval Tool (DRT) **or** a 2018 IRS Tax Return Transcript. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA at FAFSA.gov. If student and spouse filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and a 2018 IRS Tax Return Transcript must be provided for each.

If a 2018 tax return was or will be filed, check the box that applies:

- You used the IRS Data Retrieval Tool to transfer 2018 IRS income tax return information into your FAFSA.
- You have not yet used the IRS DRT, but will use the tool to transfer 2018 IRS income tax return information into your FAFSA.
- You are unable or choose not to use the IRS DRT, and instead will provide WTAMU Financial Aid with the **2018 IRS Tax Return Transcript(s)**. *Instructions for obtaining a Tax Return Transcript are located on the last page of this worksheet.*
 Check here if you **have provided** our office a 2018 IRS Tax Return Transcript(s).
 Check here if **later you will provide** to our office a 2018 IRS Tax Return Transcript(s).

2. If you did not file and will not file a 2018 tax return (or you are married and there was and will be no tax return filed for either you or your spouse), AND filing is not required:

If NO 2018 tax return was or will be filed, check the box that applies:

- You (and spouse, if married) did not work and had no income earned from work in 2018.
 - **If no income earned from work additional documentation may be required**
- You worked in 2018 (or if married, you or your spouse worked in 2018) but did not earn enough to be required to file taxes. List in the chart above **ALL** sources of income, amount earned and type of income. Provide copies of all 2018 IRS W-2 forms or equivalent documents for student and spouse.

INDEPENDENT STUDENTS ONLY: Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 income tax return was not filed.

Check here if you **have provided** our office confirmation of non-filing.

Check here if **later you will provide** to our office confirmation of non-filing.

**Instructions on how to obtain a Non-Filing Tax Transcript are located on the last page of this worksheet.*

_____ Student signature

_____ Parent signature

Student's Name: _____ Buff ID # _____

C. Dependent Student Parent's Income Information (for each parent included in the household).

- ❖ List in the box below **all 2018 income** earned by your parent(s) including W2 income, self-employment income, farm income, and/or income reported on Schedule E on the tax return. Notify our office if the parent or parents listed on your FAFSA had a change in marital status after December 31, 2018.

Employer's Name	2018 Amount Earned	IRS W2 Income?	Self-Employment Income?	Farm Income?	Rental Prop or Partnership Income?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$1500.00(example)</i>		<i>Yes(example)</i>		

❖ **Also submit the following documents:**

- ALL W2s and 1099s for income earned from work (can substitute 2018 Wage and Income Transcript obtained from the IRS)
- Schedule C for Self-Employment income or loss
- Schedule E for Rental Real Estate, Royalties, Partnerships, S Corps, Estates, Trusts, etc.
- Schedule F for Farm income or loss

3. If your parent/parents filed or will file a 2018 tax return(s). *If no 2018 tax return was filed, skip to Section 4 below.*

- If a tax return was filed or will be filed, we **require** either the IRS Data Retrieval Tool (DRT) **or** a 2018 IRS Tax Return Transcript. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA at FAFSA.gov. If parents filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the 2018 IRS Tax Return Transcript(s) must be provided for each.

If a 2018 tax return was or will be filed, check the box that applies:

- The parents have used the IRS Data Retrieval Tool to transfer 2018 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT, and instead will provide WTAMU Financial Aid with a **2018 IRS Tax Return Transcript(s)**. *Instructions for obtaining a Tax Return Transcript are located on the last page of this worksheet.*
- ___ Check here if you **have provided** our office a 2018 IRS Tax Return Transcript(s).
- ___ Check here if **later you will provide** to our office a 2018 IRS Tax Return Transcript(s).

4. If your parent/parents did not file and will not file a 2018 tax return AND filing is not required:**If NO 2018 tax return was or will be filed, check the box that applies:**

- Neither parent worked and the parents had no income earned from work in 2018.
- **If no income earned from work additional documentation may be required**
- One or both parents worked in 2018 but did not earn enough to be required to file taxes. List in the chart above **ALL** sources of income, amount earned and type of income. Provide copies of all 2018 IRS W-2 forms or equivalent documents.
- Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 income tax return was not filed.
- ___ Check here if you **have provided** our office confirmation of non-filing.
- ___ Check here if **later you will provide** to our office confirmation of non-filing.

*Instructions of how to obtain a Non-Filing Tax Transcript are located on the last page of this worksheet

Student signature_____
Parent signature

Student's Name: _____ Buff ID # _____

Basic steps for using the IRS Data Retrieval Tool (IRS DRT)

- ❖ www.fafsa.gov
 - Log in to your 20/21 FAFSA record
 - Make FAFSA corrections
 - Navigate to financial information section, follow instructions to determine if eligible to use IRS DRT
 - If eligible, transfer 2018 IRS income tax information into your FAFSA

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

- ❖ Get Transcript by MAIL – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript by MAIL.” Make sure to request the “Return Transcript” and **NOT** the “Account Transcript.” The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- ❖ Get Transcript ONLINE – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Make sure to request the “Return Transcript” and **NOT** the “Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
- ❖ Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- ❖ Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.

A **2018 IRS Non-Filing Tax Transcript** may be obtained through:

- ❖ Get Transcript by Mail - Download form 4506-T from www.irs.gov, mail or fax the completed form to the appropriate address (or fax number) at the IRS. **Make sure to check box 7 for ‘Verification of Non-filing’** After the IRS processes the signed request, the Non-Filing letter will be mailed within 5 to 10 business days.
- ❖ Get Transcript ONLINE – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Select *Verification of Non-Filing*. To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.

Have the IRS send tax return transcripts to you or your parents, **NOT** to WTAMU Financial Aid. Then you or your parents will submit copies to WTAMU Financial Aid with your name and Buff ID number on each page of the report, along with a notation of whether the report is for student, spouse, or parent. Please number each page.

D. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. The student and (if student is dependent) one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

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

Submit this worksheet to WTAMU Financial Aid.

You should make a copy of this worksheet and supporting documents for your records.

_____ Date of signature

_____ Date of signature

_____ Student signature

_____ Parent signature