



# 2020-21 VERIFICATION WORKSHEET FOR DEPENDENT STUDENTS

Your 2020–2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called **Verification**. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

## A. Demographic Information

Student's Last Name	First Name	M.I.	Student's Social Security # or CWID
Street Address, Including Apartment #			Student's Date of Birth
City	State	Zip Code	Student's E-mail Address
Student's Home Phone Number		Student's Cell Phone or Alternate Number	

## B. Household Members and Number in College

List below the people in your parent(s)' household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2020, through June 30, 2021, or if the other children would be required to provide parental information if they were completing a FAFSA for 2020–2021. Include children who meet either of these standards, even if they do not live with your parent(s).
- 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.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2020, and June 30, 2021.

*If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Age	Relationship	Name of College Currently Attending	Enrolled at Least Half Time (Yes/No?)
		<i>Self</i>	<i>Mercy College</i>	

**C. Verification of 2018 IRS Income Tax Information for Student Tax Filers**

1. **TAX RETURN FILERS** **Important Note:** If the student filed, or will file, an amended 2018 IRS tax return, the student must contact the Office of Enrollment Services at (877) MERCY-GO for additional instructions before completing this section.

**Instructions:** Complete this section if the student and spouse filed or will file a 2018 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](http://FAFSA.gov).* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

The student has used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.

The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.

The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules.**

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

- **Get Transcript by Mail** – Go to [www.irs.gov](http://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](http://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.

If the student and spouse filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** must be provided for each.

\_\_\_ A **2018 IRS Tax Return Transcript or a signed copy of the 2018 income tax return and applicable schedules** is attached.

\_\_\_ A **2018 IRS Tax Return Transcript or a signed copy of the 2018 income tax return and applicable schedules** will be provided later.

2. **TAX RETURN NONFILERS** Complete this section if the student will not file and is not required to file a 2018 income tax return with the IRS.

**Check the box that applies:**

The student was not employed and had no income earned from work in 2018.

The student was employed in 2018 and has listed below the names of all the student's employers, the amount earned from each employer in 2018, and whether an IRS W-2 form is attached. Attach copies of all 2018 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form.*

*If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2018 Amount Earned	IRS W-2 Attached?

**D. Verification of 2018 IRS Income Tax Information for Parent Tax Filers**

Note: If two parents were reported in Section B of this worksheet, the instructions below refer and apply to both parents.

- TAX RETURN FILERS** **Important Note:** If the parents filed, or will file, an amended 2018 IRS tax return, the parent must contact the Enrollment Services Office at (877) MERCY-GO for additional instructions before completing this section.

**Instructions:** Complete this section if the parents filed or will file a 2018 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](http://FAFSA.gov).* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

The parent has used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.

The parent has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.

The parent is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules.**

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

- See the Student section "C," on page 2, for the different options available to obtain a transcript.

If the parent filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** must be provided for each.

\_\_\_ A **2018 IRS Tax Return Transcript or a signed copy of the 2018 income tax return and applicable schedules** is attached.

\_\_\_ A **2018 IRS Tax Return Transcript or a signed copy of the 2018 income tax return and applicable schedules** will be provided later.

- TAX RETURN NONFILERS** Complete this section if the parents will not file and are not required to file a 2018 income tax return with the IRS.

**Check the box that applies:**

Neither parent was employed and had no income earned from work in 2018.

One or both parents were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form is attached. Attach copies of all 2018 IRS W-2 forms issued to the parents by employers. *List every employer even if they did not issue an IRS W-2 form.*

*If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2018 Amount Earned	IRS W-2 Attached?

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.

\_\_\_ Check here if confirmation of nonfiling is provided.

\_\_\_ Check here if confirmation of nonfiling will be provided later.

**E. Information for Individuals with Unusual Circumstances**

**Individuals Granted a Filing Extension by the IRS**

An individual who is required to file a 2018 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2018, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2018;
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2019 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2018 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2018.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2018 tax account information.

**Individuals Who Filed an Amended IRS Income Tax Return**

An individual who filed an amended IRS income tax return for tax year 2018 must provide a signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return;
- A **2018 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2018 IRS Form 1040 and the applicable schedules that were filed with the IRS.

**Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2018 income tax return and applicable schedules the individual filed with the IRS; *and*
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

**Individuals Who Filed Non-IRS Income Tax Returns**

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

**F. Certification and Signatures**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

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

\_\_\_\_\_  
Student's Name (PRINT)

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

***Do not mail this worksheet to the U.S. Department of Education.  
Submit it directly to the Office of Enrollment Services. Make a copy of this worksheet for your records.***