

# Quincy University

## 2019–2020 Verification Worksheet

### Dependent Student

Your 2019–2020 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. Students are requested to complete the verification process as soon as possible prior to the start of the school term or within 60 days for students who file after the start of the term.

#### A. Dependent Student’s Information

Student’s Last Name	Student’s First Name	Student’s M.I.	Student’s Social Security Number
Student’s Street Address (include apt. no.)			Student’s Date of Birth
City	State	Zip Code	Student’s Email Address
Student’s Home Phone Number (include area code)			Student’s Alternate or Cell Phone Number

#### B. Dependent Student’s Family Information

List below the people in your parent(s)’ household. **Read instructions below carefully.** Include:

- Yourself (Student)
- Your parent(s) (including a stepparent) even if you don’t live with your parent(s). Refer to StudentAid.gov/fafsa-parent or contact 1-800-433-3243 for assistance on who is considered a parent on this form.
- Your parent(s)’ other children if your parent(s) will provide more than half of their support from July 1, 2019, through June 30, 2020, or if the other children would be required to provide parental information if they were completing a FAFSA for 2019–2020. 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, 2020.

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, 2019, and June 30, 2020. *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	College	Will be Enrolled at Least Half Time
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

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.

**C. Dependent Student's 2017 Income Information to Be Verified**

1. **TAX RETURN FILERS—Important Note:** The instructions below apply to the student. If the student has questions or has unusual tax filing circumstances, contact the financial aid administrator before completing this section.

**Instructions:** Complete this section if the student, filed or will file a 2017 IRS income tax return. 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 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

**Check the box that applies:**

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2017 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 2017 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 school a **2017 IRS Tax Return Transcript**.

**A 2017 IRS Tax Return Transcript may be obtained through:**

- **Get Transcript by MAIL** -- Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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.

- Check here if the student's **2017 IRS Tax Return Transcript** is attached to this worksheet.
- Check here if the student's **2017 IRS Tax Return Transcript** will be provided later.

2. **NONTAX FILERS**-Complete this section if the student will not file and is not required to file a 2017 income tax return with the IRS. Complete the statement below certifying that the student has not filed and is not required to file a 2017 income tax return. If the student had earnings from work in 2017 also include the following: (1) a listing of the sources of any 2017 income earned by the individual from work and the amount of income from each source and (2) a copy of IRS Form W-2, or an equivalent document, for each source of 2017 employment income received by the individual.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2017.
- The student did not file taxes but was employed in 2017. List below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. Attach copies of all 2017 IRS W-2 forms issued to the student by employers. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Note: As of May 5, 2017, the IRS Non-filer Letter is no longer required for dependent students.

**Fill below only if student worked but did not file taxes.**

Employer's Name	2017 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

**D. Parent's 2017 Income Information to Be Verified**—Import Note: The instructions below apply to each parent included in the household. If two parents (parent and stepparent) were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both. Notify the Student Financial Services Office if the parents filed separate IRS income tax returns for 2017 or had a change in marital status after December 31, 2017.

**1. TAX RETURN FILERS—Important Note:** The instructions below apply to the student's parents or parent and stepparent as listed on the FAFSA. If the family has unusual tax filing circumstances, the required documents are listed at the end of this form.

**Instructions:** Complete this section if the parent(s), filed or will file a 2017 IRS income tax return. 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. In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

**Check the box that applies:**

- The parent(s) have used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student's FAFSA.
- The parent(s) have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2017 IRS income tax return information into the student's FAFSA.
- The parent(s) is unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2017 IRS Tax Return Transcript**.

**A 2017 IRS Tax Return Transcript may be obtained through:**

- **Get Transcript by MAIL** -- Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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 paper request form.

- Check here if a **2017 IRS Tax Return Transcript** is attached to this worksheet.
- Check here if a **2017 IRS Tax Return Transcript** will be provided later.

If the parents filed separate 2017 IRS income tax returns, the IRS DRT cannot be used and the 2017 IRS Tax Return Transcript(s) must be provided for each.

If married and filed separately:

- Check here if the Parent 1 attached **2017 IRS Tax Return Transcript** to this worksheet.
- Check here if the Parent 1 will provide the **2017 IRS Tax Return Transcript** later.

- Check here if the Parent 2 attached **2017 IRS Tax Return Transcript** to this worksheet.
- Check here if the Parent 2 will provide the **2017 IRS Tax Return Transcript** later.

Student's Name: \_\_\_\_\_ SSN: \_\_\_\_\_

2. **NONTAX FILERS**--Complete this section if the parents (parent and/or stepparent) will not file and are not required to file a 2017 tax return with the IRS.

Complete the signed statement below certifying that the parent(s) (parent/stepparent) has not filed and is not required to file a 2017 income tax return. If either had earnings from work in 2017 also include the following:

- (1) A listing of sources of any 2017 income earned by the individual from work and the amount of income from each source
- (2) A copy of IRS Form W-2, or an equivalent document, for each source of 2017 employment income received by the individual.

**Check the box that applies:**

- Neither parent was employed, and neither had income earned from work in 2017.
- One or both parents were employed in 2017 and have listed below the names of all employers, indicate the name of parent, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. Attach copies of all 2017 IRS W-2 forms issued to parents by employers. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

**Fill below out only if parent worked but did not file taxes.**

Employer's Name	Parent 1 or Parent 2	2017 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>Parent 1-Mary Jones</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

**Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 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. 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, be sentenced to jail, or both.**

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

*Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school.*

*Mail to: Quincy University Student Financial Services Office  
1800 College Avenue  
Quincy, IL 62301*

**Questions:** Phone: 217.228.5260

Email: [financialaid@quincy.edu](mailto:financialaid@quincy.edu)

Fax: 217.228.5635

*You should make a copy of this worksheet for your records.*

Student's Name: \_\_\_\_\_ SSN: \_\_\_\_\_

#### F. Verification of 2017 Income information for Individuals with Unusual Circumstances

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

An individual, who is required to file a 2017 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2017, must provide:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2017; **and**
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2017; **and**
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2018;
- A copy of IRS form W-2 for each source of employment income received or an equivalent document for tax year 2017 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 2017.

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

An individual who filed an amended IRS income tax return for tax year 2017 must provide a signed copy of the 2017 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; or
- A **2017 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, **and**
- A signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was 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 Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **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**

An individual who filed or will file a 2017 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2017; or
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.