Quincy University
2019–2020 Verification Worksheet
Independent 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 spouse if married, 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 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. Independent 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. Independent Student's Family Information—Number of Household Members and Number in College:

List below the people in your household. **Read instructions below carefully.** Include:

- Yourself (Student)
- Your spouse, if married
- Your or your spouse's children if you or your spouse will provide more than half of the children's support from July 1, 2019, through June 30, 2020, even if the child does not live with you.
- Other people if they now live with you and you or your spouse provides more than half of their support and will continue to provide more than half of that person's support through June 30, 2020.

Include the name of the college for any household member 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 and include the name of the college. Always count yourself as a college student. Do not include family members who are in U.S. military service academies. Include others only if they will attend, at least half-time in 2019-20, a program that leads to a college degree or certificate. *If more space is needed, attach a separate page with your name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
John Jones (example)	*25*	*spouse*	*Central University*	*Yes*
		Self		

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.

Student's Name: ____ **SSN:** __________________________

2017 Income Information to Be Verified —Important Note: The instructions below apply to student and spouse if the student is married. Notify the Student Financial Services Office if the student or spouse filed separate IRS income tax returns for 2017 or had a change in marital status after December 31, 2017.

C. TAX RETURN FILERS—**Important Note:** If the family has unusual tax filing circumstances, the required documents are listed at the end of this form.

Instructions: Complete this section if you or if married you and your spouse, 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 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(s)**.

A 2017 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by MAIL** -- Go to 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, 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 student and spouse 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 student attached **2017 IRS Tax Return Transcript** to this worksheet.
☐ Check here if the student will provide the **2017 IRS Tax Return Transcript** later.

☐ Check here if the student's spouse attached **2017 IRS Tax Return Transcript** to this worksheet.
☐ Check here if the student's spouse will provide the **2017 IRS Tax Return Transcript** later.

Student's Name: ______________________________ **SSN:** ____________________

1. **NONTAX FILERS—The instructions and certifications below apply to the student and spouse, if the student is married.** Complete this section if the student and/or spouse will not file and are not required to file a 2017 tax return with the IRS.

   Complete the signed statement below certifying that the student and/or spouse if student is married 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 the student and/or spouse were employed nor had income earned from work in 2017.

☐ The student and/or spouse were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form or an equivalent document is provided. Attach copies of all 2017 IRS W-2 forms issued to student and/or spouse if married by employers. List every employer even if the employer 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.*

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

Employer's Name	Student/Spouse	2017 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	*-Mary Jones*	*$2,000.00(example)*	*Yes(example)*

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.

D. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.
The student must sign and date. If married, the spouse's signature is

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

______________________________ ______________________
Spouse'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*** ***Fax: 217.228.5635***
You should make a copy of this worksheet for your records.

Student's Name: ____ **SSN:** _________________________

E. 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.