



U.S. Department of Education

# Independent 2019-2020 Verification Worksheet

## Federal Student Aid Program



MOUNT ST. JOSEPH UNIVERSITY

Your application was selected for review in a process called verification. The law says that, before awarding federal aid, we have the right to ask you to confirm information reported on your Free Application for Federal Student Aid (FAFSA) using this worksheet and other required documents. If there are differences, your FAFSA information will be corrected. Authority to request and review information is provided under the financial aid program rules (34 CFR, Part 686). More info: <https://www.msj.edu/tuition-aid/policies-rules-regulations/verification/>

**Notice About Income Verification:** Income information for tax filers must be matched with data on file with the Internal Revenue Service (IRS). See page 2. As such, persons who have not filed their 2017 taxes\* will not be able to complete verification until they have filed and their tax information is available from the IRS. Availability of information for online IRS Data Retrieval or IRS Tax Return Transcripts can take up to 2 weeks of filing taxes electronically and up to 8 weeks following paper tax filing.

\*Persons filing a tax deadline extension will have to complete the verification process now and again after filing taxes.

### You must complete and sign this worksheet

*Non-scholarship aid will not be available until the verification process as outlined on this worksheet is complete. Preliminary Awards are estimates of eligibility. Any delay can cause the loss of eligibility for limited aid sources. Failure to complete verification prior to last day of enrollment can result in total loss of eligibility.*

## A. Student Information

Check one:  Incoming Freshman or Transfer Student  Continuing Student

Last Name	First Name	M.I.	MSJ ID #
Address (include apt. no.)			Date of Birth
City	State	ZIP Code	Phone Number (include area code)

## B. Family Information

List the people in your household, Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if (a) you will provide more than half of their support from July 1, 2019, through June 30, 2020, or (b) the child would be required to provide your information if they were completing a FAFSA for 2019-2020. Include children who meet these standards even if they do 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, 2020.

Write the names of all household members. Also write in the name of the college for any household member who will be attending college at least half-time between July 1, 2019, and June 30, 2020, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be enrolled at least half-time?
Bill Miller (example)	18	Brother	State University	Yes
		Self	Mount St. Joseph University	

## Important Income Information for Tax Filers

**IRS DATA RETRIEVAL:** Best way to verify income is to use the IRS Data Retrieval Tool (DRT) within FAFSA.

- Go to [www.FAFSA.gov](http://www.FAFSA.gov), log into the FAFSA record, select “Make FAFSA Corrections,” and navigate to the student and parent financial sections.
- If eligible to complete the process, use the IRS DRT to transfer 2017 IRS income tax information to the FAFSA for both student and parent.
- When using IRS Data Retrieval, do not modify income after transferring it to the FAFSA. If modified, Transcript option will be required.

**IRS TAX RETURN TRANSCRIPT:** If you are unable or choose not to use the IRS Data Retrieval Tool, an IRS Tax Return Transcript will be required.

- Go to [www.IRS.gov](http://www.IRS.gov) and use the “Order a Return or Account Transcript” link or call 1-800-908-9946.
- Make sure to request a *Return* Transcript, not an *Account* Transcript.
- SSN, date of birth, and address used on the taxes needed for each tax filer when making the request. IRS will only send transcripts to address on file.
- Married persons filing separate tax returns (or newly single who filed jointly) must use Transcript option to request tax info for both parents.
- Transcripts must be submitted with this verification worksheet.

**IRS TAX RETURN:** if you do not use IRS Data Retrieval Tool or provide a tax return transcript, a **signed** copy of your filed 2017 taxes is required.

## C. Student’s (and Spouse’s if married) Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page and check only one of the boxes.

- IRS Data Retrieval in FAFSA on the Web was used to retrieve and transfer IRS income information for the student (either on the initial FAFSA or when making a correction) and no modification of the income data has since been made.
- Student unable or chooses not to use the IRS Data Retrieval Tool so 2017 IRS tax return transcript or copy of **signed** federal tax return(s) attached.
- Student filed an amended return so the 2017 IRS tax transcript *and* 2017 **signed** copy of 1040X are attached.
- Student attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below.\*

2. **TAX RETURN NON-FILERS:** Complete this section if student will not file and is not required to file a 2017 income tax return with the IRS.

- Student not employed; no earned income in 2017.
- Student employed and completed info. Every employer, even if they didn’t issue a W-2, must be listed, and W-2s must be provided if issued.

Employer’s Name	2017 Income	W-2 Attached?
	\$	
	\$	
	\$	
	\$	

## E. Certification and Signatures

By signing this worksheet, I certify that all the information reported on it is complete and correct.

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

**Do not mail this worksheet to the U.S. Department of Education.  
Mail, fax, or take it to Mount St. Joseph University.  
You should make a copy of this worksheet for your records.**

**WARNING: If you purposefully give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

\*Extension filling will require the completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to Mount St. Joseph University.

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