

# 2019-2020 VERIFICATION FORM – DEPENDENT STUDENT

Date of Birth: _____	Phone Number: _____	Banner ID: @ _____
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Name and Address (Student)

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Return to: Financial Aid Office  
 Clark Hall, IUP  
 1090 South Drive  
 Indiana, PA 15705  
 Fax: 724.357.2094

E-mail Address: \_\_\_\_\_

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 Your 2019–2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called Federal Verification. Federal Regulations require that we verify the information you and your parents reported on your FAFSA is accurate. To verify that you provided correct information, the Financial Aid Office staff will compare your FAFSA with the information on this worksheet and with any other required documents. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit all documents to the Financial Aid Office. IUP may ask for additional information.

## A. NUMBER OF HOUSEHOLD MEMBERS AND NUMBER IN COLLEGE

➔ **1.) IN THE CHART BELOW, list the people in your parent’s household that your parent(s) will support between July 1, 2019 and June 30, 2020. Include:**

- Yourself (**student**), even if you don’t live with your parent(s).
- **Your parent(s)** (including stepparent if remarried) even if the student doesn’t live with the parent(s).
- Your parent(s)’ other dependent children if your parents provide *more than half* of their support and will continue to do so between July 1, 2019 and June 30, 2020.
- 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 from July 1, 2019 through June 30, 2020.

➔ **2.) ALSO IN THE CHART BELOW, list the College/University if applicable:** Include the full name (not just initials), if applicable, 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 an eligible post-secondary institution any time between July 1, 2019 and June 30, 2020. High school/elementary school name **does not** need to be reported for any family member.

➔ **LIST IN THE CHART BELOW ALL HOUSEHOLD MEMBERS AND COLLEGE INFORMATION IF APPLICABLE:**

Full Name	Age	Relationship to Student	College/University in 2019-2020
		STUDENT (Self)	Indiana University of Pennsylvania

If more space is needed, attach a separate page include student name and IUP Banner ID.

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**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 are inaccurate.

**B. PARENT’S 2017 INCOME INFORMATION**

**1. PARENT(S) WHO FILED OR WILL FILE A 2017 FEDERAL TAX RETURN**—Important Note: The instructions below apply to each parent included in the household. If two parents were reported in Section A of this worksheet, the instructions and certifications below refer and apply to both parents.

**Instructions:** Complete this section if the parent(s) filed or will file a 2017 IRS income tax return(s). If the parent(s) did not and are not required to file a 2017 IRS income tax return, please skip this section and proceed to Section 2 for PARENT(S) WHO DID NOT FILE A FEDERAL 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 [www.FAFSA.gov](http://www.FAFSA.gov).

**NOTE:** If married and filing separate returns, or your biological parents live together and are not married, a tax transcript is required for both parents.

If you filed a 2017 U.S. Federal Tax Return please check the box that applies (please only check one box):

- The student’s parent(s) have used the IRS Data Retrieval Tool in FAFSA on the Web to directly import income tax return information into the FAFSA.
- The student’s parent(s) have not yet used the IRS Data Retrieval Tool 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’s parent(s) are unable, or chose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2017 IRS Tax Return Transcript(s)** or a **SIGNED copy of the 2017 Federal Tax Return(s)** if unable to obtain a copy of the IRS Tax Return Transcript. See page 4 for instructions on how to obtain an IRS Tax Return Transcript.

**If the parent(s) filed separate 2017 IRS income tax returns, the IRS DRT cannot be used and the 2017 Tax Return Transcript(s) or SIGNED copy of Federal Tax Return(s) must be provided for both. Please check the applicable box below if parent(s) were unable, or chose not to use IRS DRT:**

- Check here if a **2017 IRS Tax Return Transcript(s)** or **SIGNED copy of 2017 Federal Tax Return(s)** is provided.
- Check here if a **2017 IRS Tax Return Transcript(s)** or **SIGNED copy of 2017 Federal Tax Return(s)** will be provided later.

**2. PARENT(S) WHO DID NOT FILE A 2017 FEDERAL TAX RETURN**

Complete this section **ONLY IF** your parent(s), **WILL NOT file AND ARE NOT** required to file a 2017 income tax return with the IRS.

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, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. List every employer even if the employer did not issue an IRS W-2 form. (Provide copies of all 2017 IRS W-2 forms issued to the parent(s) by their employer(s).)

Employer’s Name	IRS W-2 Provided?	Annual Amount Earned in 2017
<i>(Example) ABC’s Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

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. Instructions on how to obtain a letter of non-filing or alternative acceptable documentation can be found on page 4.

- \_\_\_\_\_ Check here if confirmation of non-filing is provided.
- \_\_\_\_\_ Check here if confirmation of non-filing will be provided later.

**C. STUDENT’S 2017 INCOME INFORMATION**

**1. STUDENTS WHO FILED OR WILL FILE A 2017 FEDERAL TAX RETURN**

Instructions: Complete this section if the student filed or will file a 2017 IRS income tax return. If the student did not and is not required to file a 2017 IRS income tax return, please skip this section and proceed to Section 2 for “STUDENTS WHO DID NOT FILE A FEDERAL 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 [www.FAFSA.gov](http://www.FAFSA.gov).

If you filed a 2017 U.S. Federal Tax Return please check the box that applies (please only check one box):

- The student has used the IRS Data Retrieval Tool 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 Data Retrieval Tool 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 Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2017 Tax Return Transcript or SIGNED copy of the 2017 Federal Tax Return if unable to obtain a copy of the IRS Tax Return Transcript.** See page 4 for instructions on how to obtain an IRS Tax Return Transcript.

**2. STUDENTS WHO DID NOT FILE A 2017 FEDERAL TAX RETURN**

Complete this section **ONLY IF** the student **WILL NOT AND IS NOT REQUIRED** to file a 2017 income tax return with the IRS.

Check the box that applies (please only check one box):

- The student was not employed and had no income earned from work in 2017.
- The student was employed in 2017 and has listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. [Provide copies of all 2017 IRS W-2 forms issued to the student by their employers]. List every employer, even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student’s name and ID number at the top.

Employer’s Name	IRS W-2 Provided?	Annual Amount Earned in 2017
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

**D. CERTIFICATION AND SIGNATURES (REQUIRED)**

By signing this worksheet, I/we certify that all the information reported is complete and correct. The student and at least one parent whose information was reported on the FAFSA must sign and date. I understand that the Financial Aid Office will make corrections on the FAFSA if any differences are discovered during the verification process.

Student's Signature: \_\_\_\_\_ Date \_\_\_\_\_

Parent 1 Signature: \_\_\_\_\_ Date \_\_\_\_\_

(Father's/ Mother's/ Stepparent's) **(At least one parent must sign)**

Parent 2 Signature: \_\_\_\_\_ Date \_\_\_\_\_

(Father's/ Mother's/ Stepparent's)

(Please make a copy of this worksheet for your records.)

**INCOMPLETE FORMS WILL NOT BE ACCEPTED. ADDITIONAL DOCUMENTATION MAY BE REQUESTED.**

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

**A 2017 IRS Tax Return Transcript May Be Obtained Through (Note: if you are unable to obtain a copy of the IRS Tax Return Transcript for 2017, a SIGNED copy of the 2017 Federal Tax Return may be submitted instead):**

- 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.
- 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 2017 IRS Verification of Non-filing Letter May Be Obtained Through:**

- Get Transcript ONLINE or by MAIL – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript ONLINE" or "Get Transcript by Mail". 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.
- Paper Request Form – IRS Form 4506-T by completing lines 1-4 (following instructions from page 2 of the form) and checking box 7. Year or period requested field should be "12/31/2017". The non-filer must sign and date the form and enter their telephone number. The form should be mailed or faxed to the appropriate address or FAX number provided on page 2 of the form.

**If you have attempted to obtain a 2017 IRS Verification of Non-filing letter, but were unable to obtain, you may instead submit:**

A SIGNED STATEMENT CERTIFYING THAT THE YOU:

- Attempted to obtain the Verification of Non-filing from the IRS or other tax authorities and was unable to obtain the required documentation; AND
- Have not filed and are not required to file a 2017 income tax return, and a listing of the sources of any 2017 income earned by the individual from work and the amount of income from each source; AND EITHER
- A copy of IRS Form W-2, or an equivalent document, for each source of 2017 employment income received by the individual if the individual worked in 2017. OR
- Include in the signed statement that the individual did not work and has no income in 2017.