2020-2021 Verification Worksheet - Group V1
Dependent Students

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The federal law states that before awarding Federal Student Aid, we must ask you to confirm the information you and your parent(s) reported on your FAFSA. To do this, we will compare your FAFSA with the information on this institutional verification document and any supporting documents. If there are differences, your FAFSA information may need to be corrected and/or we may ask for you to submit additional documentation. **You and a parent whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents and submit the form to us within fourteen business days**. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

SECTION A – Student Information

Please type or print legibly using black or dark blue pen.

Fontbonne ID Number	Last Name	First Name	Middle Initial
Street	City	State	Zip
Main Phone ( ) -	Other Phone ( ) -	Date of Birth ____/____/____	

SECTION B – Family Information

List below the people in your <u>parent(s)' household</u>. If more space is needed, attach a separate page with your name and Fontbonne ID at the top. Include:

- Yourself (the student) and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parents' other children if your parents 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 2020-21. Include children who meet either of these standards even if the children do not live with your parent(s).
- Other people who now live with your parent(s) and for whom your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021.

Also include the name of the college for any household member, excluding your parents, who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2020 and June 30, 2021.

Full Name	Age	Relationship	College Attending	Enrolled at Least Half-Time Y / N?
		Self	*Fontbonne University*	

Student Name_____   **Fontbonne ID:** _____

SECTION C – Income Information

STUDENT AND PARENT TAX FILING VERIFICATION
(ONLY COMPLETE IF YOU AND/OR YOUR PARENTS FILED 2018 TAXES)

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.

Verification requires the collection of official 2018 IRS tax data for both you and your parent(s). You can verify this tax information by completing ONE of the following options:

- Link to the IRS using the IRS Data Retrieval Tool (DRT) via your FAFSA Application. To do this, visit www.fafsa.ed.gov to login to your FAFSA application and select "make corrections." The IRS DRT is located in the financial section of both the student and parent portions of the FAFSA.

- Provide a 2018 Tax **Return** Transcript or signed copy of IRS Form 1040, 1040A, or 1040EZ. Only official IRS Tax Return Transcripts, issued directly from the IRS, are acceptable. Transcripts may be requested at www.irs.gov/Individuals/Get-Transcript or by calling 1-800-908-9946.

STUDENT AND PARENT(S) NON-FILING TAX VERIFICATION
(ONLY COMPLETE IF YOU AND/OR YOUR PARENT(S) DID NOT FILE TAXES IN 2018)

Read the statements below and check the appropriate responses. **If you or your parent(s) were employed in 2018 but did not file taxes, copies of 2018 W-2 Forms from all employers are REQUIRED.**

STUDENT NON-FILER VERIFICATION	PARENT NON-FILER VERICIATION
☐ I was not employed and had no income earned from work in 2018.	☐ My parent(s) were not employed and had no income earned from work in 2018.
☐ I was employed in 2018 but am not required to file (and did not file) taxes for 2018. Below are the names of all employers and the amount earned from each employer in 2018. [Attach IRS W-2 form(s)]	☐ My parent(s) were employed in 2018 but are not required to file (and did not file) taxes for 2018. Below are the names of all their employers and the amount earned from each employer in 2018. [Attach IRS W-2 form(s)]

Employer	**Income Earned**	**Employer**	**Income Earned**
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

SECTION D – Signatures

Certification and Signatures: Each person signing this form certifies all of the information reported is complete and correct. The student and one parent must sign and date the form.

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Student's Signature	Date
Parent's Signature (Required)	Date

Submit this worksheet to Fontbonne University at the address indicated at the bottom of the page.

FOR STAFF USE ONLY:			
Please indicate below how Verification was completed:			
STUDENT VERIFICATION:		**PARENT VERIFICATION:**	
☐ IRS DRT Used	☐ Tax Transcript Provided	☐ IRS DRT Used	☐ Tax Transcript Provided
☐ W2(s) Provided	☐ W2(s) Not Required	☐ W2(s) Provided	☐ W2(s) Not Required
_____ Student Services Representative		_____ Date	

How to update tax information using the IRS Data Retrieval Tool:

1. Go to www.fafsa.gov and log into the student's 2020-2021 FAFSA record.

2. Select the blue link **"Make FAFSA Corrections"**.

3. Navigate to the **"Financial Information"** Tab at the top of the page.

4. Follow instructions to determine eligibility to use the IRS Data Retrieval Tool. This tool will be used to transfer 2018 income tax information into the student's FAFSA.

   a. It takes up to two weeks for tax data to be available through the IRS Data Retrieval Tool for electronic tax return filers, and up to eight weeks for paper tax return filers.

5. If you are eligible to use the IRS Data Retrieval Tool, enter in the appropriate four-digit FAFSA pin number for the person whose information you are retrieving. Then select the blue **"Link to IRS"** button.

6. You will now be re-directed to the IRS website. All data entered on the **"Get My Federal Income Tax Information"** page will be matched against IRS records. If any information is incorrect, you will not be allowed to transfer tax information into the FAFSA.

7. Click on **"Submit"** after entering the requested information.

8. If a successful match is made, chose the **"Transfer My Tax Information into the FAFSA"** box and click the **"Transfer Now"** button.

   a. If a successful match is not found, you will need to request an IRS Tax *Return* Transcript (not a Tax *Account* Transcript) from www.irs.gov/Individuals/Order-a-Transcript. Once you receive this information, please submit a copy of the Tax Return Transcript to the Student Services Center.

9. Data transferred from the IRS will populate in the appropriate FAFSA fields, and will be labeled **"Transferred from IRS".**

10. Click on the **"Sign & Submit"** tab at the top of the page and submit corrections.

11. You will receive a confirmation number verifying that your correction has been sent for processing. If you do not receive a confirmation number, your correction has not been sent for processing.

12. For more information regarding this process, please visit the following link: http://www.finaid.org/fafsa/irsdataretrievaltool.phtml

STUDENT SERVICES CENTER

6800 Wydown Blvd; Saint Louis, MO 63105 ▪ Phone: (314) 889-1414 ▪ Fax: (314) 889-1457 ▪ fbufinaid@fontbonne.edu

How to request a Tax Return Transcript

Tax filers can request a transcript, free of charge, of their 2018 tax return from the IRS in one of four ways.

1. Online Request
   - Available on the IRS Web site at www.irs.gov
   - In the **Tools** section of the homepage (under orange bar) click "Order a Tax Return or Account Transcript"
   - Click "Order a Transcript"
   - Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
   - Click "Continue"
   - In the **Type of Transcript** field, select "Return Transcript" and in the **Tax Year** field, select "2018".
   - If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
   - IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

2. Telephone Request
   - Available from the IRS by calling 1-800-908-9946
   - Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
   - Select "**Option 2"** to request an IRS Tax Return Transcript and then enter "**2018**".
   - If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
   - IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

3. <u>Paper Request Form – IRS Form 4506T-EZ</u>
   - Download at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf
   - Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
   - Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.
   - On line 6, enter "2018" to receive IRS tax information for the 2018 tax year that is required for the 2019-2020 FAFSA.
   - The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
   - Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
   - Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

4. <u>Visit the local IRS Office</u>
   - Find your local IRS Office by visiting the following website: http://www.irs.gov/localcontacts/index.html.
   - Click on the state in which you filed taxes and there will be a list of IRS office locations.
   - Make sure the location offers on site copies of Tax Transcripts under "**Services Provided**".
   - You may want to contact the office to verify what information you must bring with you to get a copy of the Return Transcript.
   - Visit the IRS office and request your "**2018 Return Transcript**".