

# Verification Worksheet

## Dependent Student 2019-2020



Your FAFSA was selected for review in a process called “verification.” Federal law requires that Anderson University compare your reported FAFSA data to the tax information you and your parent(s) provided the Internal Revenue Service (IRS) for 2017. The preferred method is for you to import the tax data from your 2017 tax return using the IRS Data Retrieval Tool (DRT) and resubmit your FAFSA without changing the imported data. It may be necessary for you to provide additional information to satisfy verification requirements.

No further action can be taken on your request for financial aid including all federal, state, or need-based university funds until you submit the required information and complete this process.

If there are differences between your FAFSA data and the verification documents, Anderson University will make corrections electronically. Your financial aid awards may be adjusted as a result of the correction process.

### A. Student Information (please print)

Student Name: \_\_\_\_\_ Student ID #: \_\_\_\_\_  
 Address: \_\_\_\_\_ Telephone Number: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

### B. Number in Household - determine which parent(s) to include as members of your household in Section C (below).

- If your legal parents (biological and/or adoptive) are both living and married to each other then list both of them on the verification worksheet.
- If your legal parents are divorced (or separated) list, the parent you lived with more during the past 12 months. If this parent has remarried, list that parent and the person he or she married (your stepparent).
- If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the last 12 months or during the most recent year that you actually received support from a parent.
- If your legal parents are not married to each other but live together select “unmarried / both parents live together” and list both of them regardless of their gender.
- If one of your parents has died list, the surviving parent. If the surviving parent is remarried, list both the surviving parent and the person he or she married (your stepparent).
- Do not include any person who is not married to your parent and who is not a legal or biological parent.
- A couple doesn’t have to be legally separated to be considered divorced/separated for FAFSA purposes; they may consider themselves separated when one has permanently left the household.
- A stepparent is treated the same as a biological parent if the stepparent is married to the biological parent whose information is reported on the FAFSA. There are no exceptions.
- Being claimed as a dependent on a parent’s tax return is NOT relevant when answering FAFSA questions.

### C. Number in Household / Number in College - Please list in the table below all the people living in your parents’ household.

- Include yourself.
- Include your parent(s).
- Include other siblings and other persons (like a grandparent) who live in your parent(s) household if your parent(s) will provide more than half of their financial support from July 1, 2019, through June 30, 2020.

**Important:** If any member of your household will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution between July 1, 2019 and June 30, 2020, please include the name of the college they will attend.

Full Name	Age	Relationship to Student	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>		
		<i>Parent(s)</i>		

(over)

**Anderson University Office of Student Financial Services — Verification Worksheet (Dependent Student)**

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**D. Tax Filers**

Complete Section D if the student or parents have filed or will file a 2017 IRS income tax return. The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of *FAFSA on the Web*. In most cases, no further documentation is needed to verify 2017 income information IF you transfer the data into the student’s FAFSA using the Data Retrieval Tool AND you do not make any changes to the imported information. Please resubmit your FAFSA once the Tool has been used.

*Please check all that apply.*

- The parent(s)  The student has used the Data Retrieval Tool in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student’s FAFSA.
- The parent(s)  The student has not yet used the 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 within 2-3 weeks after e-filing.
- The parent(s)  The student is unable or choose not to use the Data Retrieval Tool in *FAFSA on the Web*, and instead will provide Anderson University a 2017 IRS Tax Return Transcript.
- The parents filed separate 2016 IRS income tax returns, and each parent will provide their own 2017 IRS Tax Return Transcript, since using the Data Retrieval Tool is not an option.

In most cases the IRS makes tax return information available for the Data Retrieval Tool and the Tax Return Transcript within 2–3 weeks after accepting your e-filed tax return.

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**E. Nontax Filers**

Complete Section E if the student or parent(s) will not file and are not required to file a 2017 income tax return with the IRS.

*Please check all that apply*

- The parent(s)  The student was not employed and had no income earned from work in 2017.
- The parent(s)  The student was employed in 2017, and either:
  - will provide copies of all W-2’s they received from each employer, or
  - if W-2’s were not issued, list below all sources and amounts of income you earned from working in 2017.

Your Full Name	Employer’s Name	Annual Amount
a.	a.	\$
b.	b.	\$
c.	c.	\$
d.	d.	\$

If you are the parent of a dependent student, submit an IRS Verification of Nonfiling Letter. The federal government now requires the parents of dependent students who filed a FAFSA to have the IRS verify if no tax return was filed. If you fit this category and did not file a 2017 tax return, you must request a Verification of Nonfiling Letter from the IRS and submit the nonfiling letter as part of your financial aid application materials. For more information on nonfiling letters, see the IRS Get Transcript web page at <https://www.irs.gov/individuals/get-transcript>.

**DO NOT list AU as a third-party recipient when** requesting your nonfiling letter. You should have the IRS send the document directly to you; then you should submit a copy to Student Financial Services.

**Dependent students who did not file** a 2017 tax return do **NOT** have to submit an IRS Verification of Nonfiling Letter.

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**F. Sign this Worksheet** – Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date.

Student’s Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent’s Signature \_\_\_\_\_ Date \_\_\_\_\_

Please return this worksheet to the Office of Student Financial Services at Anderson University via fax (765) 641-3831 or email to [sfs@anderson.edu](mailto:sfs@anderson.edu).