

Verification Worksheet

Independent 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

Student Name (print): _____ Student ID #: _____

Address: _____ Telephone Number: _____

City: _____ State: _____ Zip Code: _____

B. Number in Household - determine who to include as members of your household in Section C (below).

- If you are married include your spouse on the verification worksheet.
- Marital status is determined as of the day you filed the FAFSA. If you are planning to get married but were not married on the day you filed the FAFSA, your future spouse is not included in the household size.
- You should not report any information for a friend or roommate unless the two of you are actually married.
- 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.
- An unborn child who will be born during the 2019–20 school year may also be counted in the household size if the student and spouse will provide more than half of the child's support between July 1, 2019 and June 30, 2020.
- Being claimed as a dependent on someone else'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 household.

- Include yourself.
- Include your spouse.
- Include the student's or the spouse's children if the student or spouse will provide more than half of the children's support between July 1, 2019 and June 30, 2020, even if the children do not live with the student.
- Include other people if they now live in the student's household and if the student or spouse provides more than half of their support and will continue to provide more than half of their support between July 1, 2019 and June 30, 2020.

Important: If any member of the student's 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)
		Self		

(over)

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

D. Tax Filers

Complete Section D if the student or spouse 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 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 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 student is unable or chooses 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 student and spouse filed separate 2017 IRS income tax returns, and each will provide their own 2017 IRS Tax Return Transcript, since using the Data Retrieval Tool is not an option.

For helpful details on when and how to use the IRS Data Retrieval Tool and options for requesting an IRS Tax Return Transcript visit the AU website <http://www.anderson.edu/finaid/verification>. 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 they accepting your e-filed tax return.

E. Nontax Filers

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

Please check all that apply

- The student ● The spouse was not employed and had no income earned from work in 2017.
- The student ● The spouse 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.	\$

REQUIRED - Verification of Non-filing for 2017 Tax Year

Students who did NOT file a 2017 IRS Tax Return MUST request a Verification of Non-filing from the IRS. Request the document from this website: <https://www.irs.gov/individuals/get-transcripts>. Choose “Get Transcript Online.” Enter all required information to verify your identity. When prompted, select “Verification of Non-filing” and “2017” for the tax year. If you are not able to verify your identity, you must use the following option: Print IRS Form 4506-T and fax it directly to the IRS at 859-669-3592. You can download the document from this website: <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Check number 7 and enter “12/31/2017” on line 9. Please read the form carefully and provide all the required information and signatures. Submit a copy of the Verification of Non-filing form you receive from the IRS with this form.

If you DID NOT receive a W-2 form or a 1099 form from an employers listed above, please explain how you were paid (if you did receive a W-2 or 1099 but cannot locate it, you will need to request another copy from you employer.)

F. Sign this Worksheet – By signing below, I certify that all the information reported on it is complete and correct.

Student’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.