



2019–2020 Verification Worksheet Dependent Student

SECTION I: Dependent Student Information

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's Cell Phone Number
City	State	Zip Code	Student's Email Address

SECTION II. Number of Household Members and Number in College

List below the people in the parent(s)' household. Include:

- The student
- The parents (including a stepparent) even if the student does not live with the parents.
- The parents' other children if the parents will provide more than half of their support from July 1, 2019 through June 30, 2020, or if the other children would be required to provide parental information if they were completing a FAFSA for 2019-2020. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2020.

In the "College" column, list the name of the college for any household member, **except the parent(s)**, who will be enrolled, **at least half time** in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2019, and June 30, 2020.

If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

Full Name	Age	Relationship	College (Do not list a college for a parent)	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>Howard Payne University</i>	

We may require more information and/or documentation regarding the household members enrolled in eligible postsecondary educational institutions.

VERIFICATION OF 2017 INCOME TAX RETURN INFORMATION

The best way to verify income is by using the "LINK TO IRS" (IRS Data Retrieval Tool/ DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2017 taxable income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. If the parents filed separate 2017 IRS income tax returns, the IRS DRT cannot be used and the 2017 IRS Tax Return Transcript(s) must be provided for each parent. If the student and/or parent is unable or chooses not to use the IRS DRT in FAFSA on the Web, a **2017 IRS Tax Transcript** must be provided and may be obtained through:

- **GET TRANSCRIPT BY MAIL** -Go to www.irs.gov. Click "GET YOUR TAX RECORD". Click "Get Transcript by Mail". Use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2017 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2017 IRS income tax return). **Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript."**
- **GET TRANSCRIPT ON-LINE**– Go to www.irs.gov. Click "GET YOUR TAX RECORD". Click "Get Transcript ONLINE. To use the Get Transcript Online tool, the user must have (1) access to a valid e-mail 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 for a home mortgage or auto loan). **Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Account Transcript"**. The transcript displays online upon successful completion of the IRS's two-step authentication.
- **AUTOMATED TELEPHONE REQUEST** – 1-800-908-9946
- **PAPER REQUEST FORM** – IRS Form 4506T-EZ or IRS Form 4506-T at www.irs.gov

Student's Name: _____ Social Security #: _____

SECTION III. Dependent Student Income Information

Complete either Section A or Section B. Do not complete both.

A. STUDENT TAX FILERS - Verification of 2017 IRS Income Tax Return Information
(Complete this section only if you filed a tax return.)

Check the box that applies:

- The student has used the IRS DRT 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 DRT 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 DRT in *FAFSA on the Web*, and instead will provide the school a 2017 IRS Tax Return Transcript(s). **Be sure to put your full name and the last 4 digits of your Social Security Number on your tax transcript.**
 - ___ Check here if a **2017 IRS Tax Return Transcript(s)** is provided.
 - ___ Check here if a **2017 IRS Tax Return Transcript(s)** will be provided later.

B. STUDENT NONTAX FILERS - Verification of 2017 Income Information

(Do not complete this section if you filed a tax return. Complete this section if the student will not file and is not required to file a 2017 income tax return with the IRS.)

Check the box that applies:

- 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 by the employer. Attach 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	2017 Amount Earned	IRS W-2 Provided by employer?
	\$	
	\$	
	\$	
<i>Total Amount of Income Earned from Work</i>	\$	XXXXXXXXXXXXXXXXXXXX

Student's Name: _____ Social Security #: _____

SECTION IV: Verification of Other Untaxed Income for 2017 (Student and Parent)

IF ANY ITEM DOES NOT APPLY, enter "N/A" for "Not Applicable" where a response is requested, or enter 0 in an area where an amount is requested.

Answer each question below as it applies to the student and the student's parent(s) whose information is on the FAFSA. **To determine the correct annual amount for each item:** If you paid or received the same dollar amount every month in 2017, multiply that amount by the number of months in 2017 you paid or received it. If you did not pay or receive the same amount each month in 2017, add together the amounts you paid or received each month. If more space is needed, provide a separate page with the student's name and ID number at the top.

A. Payments to tax-deferred pension and retirement savings

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).

Name of Person Who Made the Payment	Total Amount Paid in 2017
	\$
	\$
	\$

B. Child support received

List the actual amount of any child support received in 2017 for the children in your household. **Do not include** foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child For Whom Support Was Received	Amount of Child Support Received in 2017
		\$
		\$
		\$
		\$
		\$

C. Housing, food, and other living allowances paid to members of the military, clergy, and others

Include cash payments and/or the cash value of benefits received. **Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2017
		\$
		\$

D. Veterans non-education benefits

List the total amount of veterans non-education benefits received in 2017. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. **Do not include** federal veterans educational benefits such as: Post-9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits,

Name of Recipient	Type of Veterans Non-education Benefit	Amount of Benefit Received in 2017
		\$
		\$

E. Other untaxed income - List the amount of other untaxed income not reported and not excluded elsewhere on this form.

Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. **Do not include** any items reported or excluded in A – D above. In addition, do not include extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Amount of Other Untaxed Income Received in 2017
		\$
		\$

Student's Name: _____ Social Security #: _____

SECTION V: Parent Income Information. Instructions below apply to each parent in the household. Notify the financial aid office if parents filed separate IRS 2017 income tax returns 2017 or had a change in marital status after December 31, 2017.

A. PARENT TAX FILERS - Verification of 2017 IRS Income Tax Return Information.
(Complete this section only if the parents filed or will file a 2017 IRS income tax return/s.)

Check the box that applies:

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2017 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a 2017 IRS Tax Return Transcript(s). **Put the student's full name and the last 4 digits of their Social Security # on the tax transcript to ensure that we can match the tax transcript to the proper student record.** If the parents filed separate 2017 IRS income tax returns, **2017 IRS Tax Return Transcripts** must be provided for each parent.

_____ Check here if a **2017 IRS Tax Return Transcript(s)** is provided.
_____ Check here if a **2017 IRS Tax Return Transcript(s)** will be provided later.

B. PARENT NONTAX FILERS- Verification of 2017 Income Information

(Do not complete this section if you filed or will file a 2017 tax return. The instructions and certifications below apply to each parent included in the household. Complete this section if the parents 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 had no 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 by the employer. Attach copies of all 2017 IRS W-2 forms issued to the parents 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	2017 Amount Earned	IRS W-2 Provided by the employer?

CONFIRMATION OF NON-FILING: A confirmation of non-filing can be obtained from the IRS at www.irs.gov using Form 4506-T and checking Box 7.

_____ Check here if confirmation of nonfiling is provided. Nontax filers must provide confirmation of non-filing dated on or after October 1, 2018.
_____ Check here if confirmation of nonfiling will be provided later.

Verification is not complete until the confirmation of non-filing is received.

SECTION VI: Certifications and Signatures. Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. Signatures below authorize Howard Payne University officials to make any electronic corrections needed to the information reported on the Free Application for Federal Student Aid (FAFSA) as a result of the verification process.

Student's Printed Name: _____ Student's Signature: _____ Date: _____

Parent's Printed Name: _____ Parent's Signature: _____ Date: _____

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