



2019–2020 Verification Worksheet Independent Student

SECTION I: Independent 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 your household. Include:

- Yourself
- Your spouse, if you are married
- Your other children and/or your spouse's children if you or your spouse provides 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,
- Other people, if they now live with the student, and the student or spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2020.

Include the name of the college for any household member 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	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>Howard Payne University</i>	

We may require more information 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 student is married and the student and spouse filed separate tax returns, the IRS DRT cannot be used and 2017 IRS Tax Return Transcripts must be provided for each. **If the student 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 A TAX 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. **Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Account Transcript"**. 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 home loan). 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. Independent Student Income Information

The instructions below apply to the student and spouse, if the student is married. Notify the Financial Aid Office if the student or spouse filed **separate IRS income tax returns for 2017** or had a change in marital status after the end of the 2017 tax year on **December 31, 2017**.

Verification of 2017 IRS Income Tax Return Information for Student/Spouse Tax Filers

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.

If married, complete this section:

- The spouse has used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student's FAFSA.
- The spouse 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 spouse 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.

Verification of 2017 Income Information for Student/Spouse Nontax Filers

Complete this section if the student and/or spouse will not file and are 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 spouse was not employed and had no income earned from work in 2017.
- The student/spouse 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 and spouse 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	Name of Wage Earner	IRS W-2 Provided by the Employer?	2017 Amount Earned

Note: We may require you to provide documentation from the IRS that indicates that a 2015 income tax return was not filed with the IRS.

CONFIRMATION OF NON-FILING

- Nontax filers must provide confirmation of non-filing dated on or after October 1, 2018.
- Tax filers who received an extension but still have not filed their 2017 income tax must provide confirmation of non-filing dated on or after October 1, 2018.
- 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 non-filing is provided.

___ Check here if confirmation of non-filing will be provided later. (Verification cannot be completed until this is received.)

Student's Name: _____ Social Security #: _____

SECTION IV: Verification of Student/Spouse's Other Untaxed Income for 2017

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 spouse, if married. **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.

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. If a parsonage was provided, report the fair rental value of the housing provided. **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: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill

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 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, 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

SECTION V: Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student 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 Id# _____ Spouse's Printed Name (If Applicable) _____

Student's Signature _____ Date _____ Spouse'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.