Financial Aid Office
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phone: (814) 732-3500
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2020/2021 Dependent Verification Worksheet

Student Name: _____ **EU Student ID:** @_____
Last First

Date of Birth _____ **Student Cell:** _____

What is verification?

The US Department of Education has selected your application for review in a process called Verification. The Financial Aid Office is required to compare the data provided on this form, IRS tax information and other requested documents to the information provided on your FAFSA.

NOTE: Federal aid will not be awarded or disbursed until verification is complete. Failure to complete the verification process in a timely manner may result in loss of federal grants and loans including the Parent PLUS loan.

STEPS TO COMPLETE VERIFICATION

Step 1: Complete this form
Step 2: Provide **2018** tax information (preferably by using the IRS Data Retrieval Tool – instructions enclosed). **If your parent(s) did not file, an IRS Verification of Non-filing letter is required (instructions enclosed)**
Step 3: Return this form by mail or fax to the Financial Aid Office as soon as possible.

A. HOUSEHOLD INFORMATION

- ***List the people in your parent(s) household that they will support between July 1, 2020 and June 30, 2021.***
- ***Indicate the name of college for any household member who will be at least half-time in a degree or certificate program at a post-secondary institution at any time between July 1, 2020 and June 30, 2021. Please include:***

Yourself (student):

Full Name	*Age*	*Relationship to Student*	*College/University in 2020/2021*	*Enrolled at Least Half Time*
		Student (you)	*Edinboro University*	❑

Your parent(s) and/or stepparents (as reported on the FAFSA):

Full Name	*Age*	*Relationship to Student*	*College/University in 2020/2021*	*Enrolled at Least Half Time*
				❑
				❑

Your parent(s) dependent children/stepchildren, and they provide ***more than half*** of their support and will continue to do so between **July 1, 2020 and June 30, 2021:**

Full Name	*Age*	*Relationship to Student*	*College/University in 2020/2021*	*Enrolled at Least Half Time*
				❑
				❑
				❑

Other people, if they now live with your parent(s), and they provide ***more than half*** of their support and will continue to provide more than half of their support from **July 1, 2020 and June 30, 2021:**

Full Name	*Age*	*Relationship to Student*	*College/University in 2020/2021*	*Enrolled at Least Half Time*
				❑
				❑

if more space is needed, attach separate page including student name and ID

Student Name: _____ **EU Student ID:** @_____

B. PARENT(S) 2018 INCOME INFORMATION

Did your parent(s) file a 2018 U.S. Federal Tax Return? Please check one box only.

❑ **Yes, the student's parent(s) filed a 2018 Federal IRS Tax Return** and will use the IRS Data Retrieval Tool from the FAFSA at fafsa.gov **OR** provide a Tax Return Transcript. See instructions on the "IRS Tax Document Instructions".

NOTE: If married and filing separate returns or if student's biological parents live together and are not married, a tax transcript is required for both parents.

❑ **No, the student's parent(s) will not file and are not required to file a 2018 IRS Federal Tax Return.**

- **Complete the chart below**: list employer(s) and the amount that was earned in 2018
  If none, list $0 or N/A
- **Attach copies of all 2018 W-2 and 1099 Forms** for each employer/source listed below.
- **AND Submit a 2018 IRS Verification of Non-filing Letter**. A free IRS Verification of Non-filing letter can be obtained from the IRS or by mailing a completed Form 4506-T to the IRS.

Employer/Source of Income	2018 Amount Earned	2018 W-2 and/or 1099 attached
	$	Yes ❑
	$	Yes ❑

C. STUDENT 2018 INCOME INFORMATION

Did you file a 2018 U.S. Federal Tax Return? Please check one box only.

❑ **Yes, I filed a 2018 Federal IRS Tax Return and will use the IRS Data Retrieval Tool from the FAFSA** at fafsa.gov **OR** provide a Tax Return Transcript. See instructions on the "IRS Tax Document Instructions".

❑ **No, I will not file and I am not required to file a 2018 IRS Federal Tax Return.**

- **Complete the chart below**: list employer(s) and the amount that was earned in 2018.
- **If none, list $0 or N/A**
- **Attach copies of all 2018 W-2 and 1099 Forms** for each employer/source listed below.

Employer/Source of Income	2018 Amount Earned	2018 W-2 and/or 1099 attached
	$	Yes ❑
	$	Yes ❑

D. CERTIFICATION

By signing this worksheet, I/we certify that all the information reported is complete and correct. I understand that the Edinboro University Financial Aid Office will make corrections on the FAFSA if any differences are discovered during the verification process.

_____ _____ _____ _____

Student Signature ***Date*** ***Parent Signature*** ***Date***

Federal Warning:

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

IMPORTANT NOTICE: All other aid requirements must be satisfied to be eligible for aid such as academic progress, enrollment, etc.

Mail or fax this signed form to any of the contact information listed on first page

IRS TAX DOCUMENTATION PROCESS INSTRUCTIONS

You have several options for completing the IRS Tax Documentation requirement if you filed or are required to file a 2018 IRS tax return. The preferred method is Option 1 - IRS Data Retrieval Tool (DRT) which is done through the FAFSA. If you are unable to use the IRS Data Retrieval Tool, you can then use Option 2 - Requesting a Tax Return Transcript.

Option 1: FAFSA IRS Data Retrieval Tool (DRT) Instructions (Preferred Method)

The preferred method is the IRS Data Retrieval Tool, which is done through the FAFSA. If you successfully used the IRS Data Retrieval Tool when you filed your FAFSA, you have already completed this step. Check the ***FAFSA*** to confirm whether or not the data retrieval tool (DRT) was used previously.

- **Log in to your current FAFSA form** by entering the student's information; click **"Make FAFSA Corrections";** enter the student FSA ID and the password you created when you filed the original FAFSA and click next.
- Go to the Financial Information tab. Parent tax information is first. Select "Already Completed" as the parents' tax filing status.
- **Click "Link to IRS".** Select if you are *Parent 1* or *Parent 2* and log in with the parent FSA ID. Click "Proceed to the IRS SITE" to be transferred to the IRS to retrieve your information.
- Once at the IRS site**, enter your information *exactly* as it appears on your federal income tax return** and click the "Submit" button.
- **Check the "Transfer My Tax Information into the FAFSA form**" box, and click the "Transfer Now" button.
- You will know that your federal tax return information has been successfully transferred because the words **"Transferred from the IRS" will display in place of the IRS information in your FAFSA form**.
- **Enter 2018 wages for Parent 1 and Parent 2**, if applicable. See 2018 W-2 form(s) for amounts.
- Click "Next" **and repeat the data retrieval process to retrieve the student tax information** if they filed in 2018, before going to the last step. Once you have transferred both the parent and student tax information, if applicable, you are directed back to the FAFSA.

- **YOU ARE NOT DONE!** Complete the Sign and Submit section by using both the student and parent FSA ID to electronically sign your FAFSA and remember to click "**Submit My FAFSA Now**". You will know your FAFSA has been submitted successfully when you arrive at the Confirmation Page. You will receive a confirmation number and a letter in the mail from the IRS confirming that you have used the IRS Data Retrieval Tool.

Option 2: Tax Return Transcript Instructions

If you are unable or choose not to use the IRS Data Retrieval Tool, please submit a ***SIGNED*** copy of your 2018 federal tax return. If you are married and filed separate returns, both of your federal tax returns are required. If you do not have a copy of your 2018 tax return, you can order a **tax return transcript** either by mail, online or by phone (instructions are below). **NOTE: If you filed a joint tax return, you MUST use the primary tax payer (top person listed) when requesting the tax transcript by phone or online.**

By Phone: Call 1-800-908-9946 to order your 2018 **Tax Return Transcript** (Option 2 on the menu). See **NOTE** above.

Online: Go to www.IRS.gov ; Click "Get Your Tax Record"

- Click "Get Transcript by MAIL"
- Enter your Social Security Number, Date of Birth and Address as listed on your tax return. See **NOTE** above.
- Request the **Return Transcript (not the account transcript)** for 2018. If you select by MAIL, allow 5 to 10 days to receive your transcript by mail.

OR

- Get transcript online
- Register for an account by following the directions provided
- Once the account is authenticated, you can print the PDF of your IRS Tax Return Transcript **(not the account transcript)** for **2018**

IRS VERIFICATION OF NON-FILING LETTER INSTRUCTIONS

What is an IRS Verification of Non-filing Letter?

An IRS Verification of Non-filing Letter: This letter can be requested free of charge from the IRS. It provides proof that the IRS has no record of a returned filed for the year you requested (2018):

Option 1: Verification of Non-filing Letter – Paper Form (4506-T) Request: (Required for parents who never filed an IRS Tax Return)

Download IRS Form 4506-T at https://www.irs.gov/pub/irs-pdf/f4506t.pdf .

- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 3: enter the non-filer's street address and postal code. Use the address currently on file with the IRS.
- Line 7: Select the checkbox on the right hand side for Verification of Non-filing.
- Line 9: Year or period requested field, enter **"12/31/2018".**
- The non-filer must sign and date the form and enter their telephone number. Only one signature is required when requesting a joint IRS Verification of Non-filing Letter.
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of Form 4506-T.
- If the 4506-T information is successfully validated, tax filers can expect to receive a paper IRS Verification of Non- filing Letter at the address provided on their request within 5 to 10 days.