



Initials: _____

UNIVERSITY OF SOUTH ALABAMA

JAG#: _____

2019-2020 Dependent Verification Worksheet

Your 2019–2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification, which requires documentation of select data elements of a student's FAFSA. In this review, the information provided on your FAFSA is compared to the information provided in the required verification documents. If the information received results in a correction, you will receive a new Student Aid Report. To continue the processing of your federal financial aid eligibility, you must complete and return all requested documentation to: **USA Office of Financial Aid, 390 Alumni Circle, Suite 1200 Mobile, AL 36688. You may also send the documents by fax to (251) 460-6517 or (251) 460-6079, or email FROM YOUR JAGMAIL ADDRESS ONLY to finaid@southalabama.edu. Your eligibility for federal financial aid will not be reviewed until all requested information has been submitted and processed.**

A. Dependent Student's Information

 Student's Last Name Student's First Name Student's M.I. Last Four Digits of Student's SSN

 Student's Street Address (include apt. no.)

 City State Zip Code

B. Dependent Student's Family Information

List the members of the parents' household below. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's 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 a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2020.

| Full Name | Age | Relationship | College* | Will Be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|----------|---|
| | | <i>Self</i> | | |
| | | | | |
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* Provide the name of the college at which any household member (other than parents) is/will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary institution any time between July 1, 2019, and June 30, 2020. If more space is needed, provide a separate page with the student's name and JAG Number at the top. **Note: Additional documentation may be requested if there is reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.**

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS--

Instructions: Due to the Early FAFSA initiative, students are required to report 2017 income information. Complete this section if the student filed or will file a 2017 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

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 with a **2017 IRS Tax Return Transcript(s)**.

How to Obtain a 2017 IRS Tax Return Transcript:

- Get Transcript by MAIL - Go to www.irs.gov and select "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript ONLINE - Go to www.irs.gov and select "Get Your Tax Record." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." To use the "Get Transcript Online" tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used), and (3) specific financial account numbers (such as credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request - 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

- _____ 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.

2. TAX RETURN NON-FILERS—

Instructions: Due to the Early FAFSA initiative, students are required to report 2017 income information. 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 therefore 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 or an equivalent document is provided. **Provide copies of all 2017 IRS W-2 forms issued to the student by each employer.** List every employer even if the employer did not issue an IRS W-2 form.

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2017 |
|--|---|------------------------------|
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

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

D. Parent's Income Information to Be Verified**1. TAX RETURN FILERS--**

Instructions: Due to the Early FAFSA initiative, parent(s) of dependent students are required to report 2017 income information. Complete this section if the parents filed or will file a 2017 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Note: The instructions below apply to each parent included in the household. Notify the Office of Financial Aid if the parents filed separate IRS income tax returns for 2017 or had a change in marital status after December 31, 2017.

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 with a **2017 IRS Tax Return Transcript(s)**.

How to Obtain a 2017 IRS Tax Return Transcript:

- **Get Transcript by MAIL** - Go to www.irs.gov and select "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript ONLINE** - Go to www.irs.gov and select "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." To use the "Get Transcript Online" tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used), and (3) specific financial account numbers (such as credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** - 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

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.

_____ 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 Individuals Granted a Filing Extension by the IRS:

An individual who is required to file a 2017 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2017 must provide:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2017;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2017;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2018; **and**
- A copy of IRS form W-2 for each source of employment income received for tax year 2017 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2017.

Student's Name: _____

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Verification of 2017 Income Information for Individuals Who Filed an Amended IRS Income Tax Return:

An individual who filed an amended IRS income tax return for tax year 2017 must provide a signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS **in addition to one of the following:**

- IRS DRT information on a FAFSA record with all tax information from the original return; **or**
- A **2017 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified.

2. TAX RETURN NONFILERS—

Instructions: Due to the Early FAFSA initiative, parent(s) of dependent students are required to report 2017 income information. 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 neither had 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 or an equivalent document is provided. **Provide 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.

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2017 |
|--|---|------------------------------|
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

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

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS or relevant tax authority.

- Check here if confirmation of nonfiling is provided.
- Check here if confirmation of nonfiling will be provided later.

E. Certification 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.

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

Student's Signature

Date

Parent's Signature

Date

******Typed or computer generated signatures will not be accepted******