



2020-2021 Verification Worksheet for Dependent Students

Federal Student Aid Programs

Your student aid application was selected by the U. S. Department of Education for review. We are required by federal law to compare your application with information on this form and with your and your parent's 2018 federal tax information.

If any items have to be corrected, the Truman State University Financial Aid Office will send changes to the Central Processing System electronically. You will receive a new SAR, which allows you to see the changes and results.

What you should do:

- Submit all documents as soon as you can - by June 1 if you expect aid to be ready when classes begin, **Aug. 17, 2020**, to the Truman State University Financial Aid Office.
- Pay deposits and pre-enroll when scheduled, because verifications for enrolled students are done first.
- Respond promptly to requests for additional information.

Until verification is complete federal aid awards cannot be paid. The final deadline is April 1, 2021, or prior to withdrawal from school. (For Pell Grant only, the deadline will be given in the Federal Register or will be within 120 days after the last day of enrollment, whichever is earlier.)

A. Student Information

Last Name First Name M.I. Social Security Number Student ID #

Street Address City State ZIP

Student Phone Number Parent Phone Number

By providing an email address below, you are authorizing the Truman State University Financial Aid Office to communicate through email if any additional information is required for verification. Please DO NOT provide email addresses if you do not check your email account regularly. If a parent email is not provided, all requests for parental information will be made via paper mailed to the permanent address on file.

Student Email Address Email Address for Parent (whose information is provided on FAFSA)

B. Parent Marital Status

What was your **parent's** marital status on the date you completed the FAFSA? ***Additional instructions on page 4***
If your parent's marital status is different today from the date you filed the FAFSA, attach a statement indicating the change and date of change.

- Never Married Married/Remarried Widowed
 Unmarried Living Together Divorced/Separated

C. Family Information

List **all** people in your parent's household in the chart below. **Be sure to include:**

- Yourself
- Your parent(s) (Including step-parent) Do not include your non-custodial parent ***Additional instructions on page 4***
- Your parent(s)' other dependent children if your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021
- Other people only if they currently live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021

Also write in the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half-time in a degree, diploma, or certificate program at a post-secondary educational institution any time between July 1, 2020 and June 30, 2021. **Do not** list high school students participating in dual credit courses as being in college. If you need more space, attach a separate page with the student's name and Student ID number at the top.

Full Name	Age	Relationship to Student	Attending College during 2020-21	Name of College if enrolled 2020-21 school year
		Self	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Truman State University
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

D. Student Income Information

Have you or will you file a 2018 U.S. Federal Tax Return?

- YES:** Submit your Student 2018 Tax Return Transcript from the IRS. Tax transcripts are not the same as copies of the IRS 1040 tax returns. ***Instructions for requesting a transcript on page 4***
- NO:** Complete the Non-Tax Filers Only section below if the student did not/will not file and is not required to file a 2018 Federal IRS Tax Return.

This section for non tax filers only

Non-Tax Filers Only - Check the one box that applies:

- The student was not employed and had no income earned from work in 2018.
- The student was employed in 2018. Complete the table below and submit all W-2 and 1099 forms documenting student income. If you were not issued a W-2 from your employer, provide a written statement explaining why not, along with any other documentation you may have been issued.

Source of Income/ Employer Name	2018 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No

Victims of Identity Theft: If you the student were a victim of an IRS identity theft for the 2018 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 4 for additional instructions.

- Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2018 tax year. The IRS has been made aware of this tax-related identity theft.

E. Parent Income Information

Complete the section below for the parent(s) listed in Section C of this worksheet. If two parents were listed in the household, provide information below for both.

Have you or will you file a 2018 U.S. Federal Tax Return?

- YES:** Submit your Parent 2018 Tax Return Transcript from the IRS. Tax transcripts are not the same as copies of the IRS 1040 tax returns. ***Instructions for requesting a transcript on page 4***
- NO:** Complete the Non-Tax Filers Only section below if the parent did not/will not file and is not required to file a 2018 Federal IRS Tax Return. **In addition, confirmation from the IRS of non-filing status is REQUIRED.** ***Instructions for requesting a Verification of Non-Filing letter on page 4***

This section for non tax filers only

Non-Tax Filers Only - Check the one box that applies:

- The parent was not employed and had no income earned from work in 2018. **Additional information may be requested.**
- The parent was employed in 2018. Complete the table below and submit all W-2 and 1099 forms documenting parent income. If you were not issued a W-2 from your employer, provide a written statement explaining why not, along with any other documentation you may have been issued.

Source of Income/ Employer Name	2018 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No

Victims of Identity Theft: If you the parent were a victim of an IRS identity theft for the 2018 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 4 for additional instructions.

- Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2018 tax year. The IRS has been made aware of this tax-related identity theft.

F. Child Support Paid

Did either the student or parent/stepparent listed in Section C of this worksheet pay child support during 2018?

- Yes (If yes, you must complete the chart below - *Report Annual Amounts/List Each Child Separately*)
- No

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Child's Age	Amount of Child Support Paid in 2018
				\$ _____ / year
				\$ _____ / year
				\$ _____ / year

G. Sign and Date This Worksheet

By signing this worksheet we certify that all the information reported on it is complete and correct.
Warning: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both.

 Student's Signature (Required)

 Parent's Signature (Required)

 Date

 Date

Verification Checklist

Before submitting this worksheet, double check that you have done the following:

- Listed everyone in the household in Section C, including parent(s) and other siblings if applicable
- Attached Student/Parent IRS Tax Return Transcripts or successfully used the IRS Data Retrieval Tool in FAFSA for tax filers (see page 4)
- Completed the Student/Parent Non-Tax Filer Charts in Section D and E for non-tax filers and attached all supporting income documentation
- Completed Section F Child Support Paid
- Student Signed/Dated Worksheet
- Parent Signed/Dated Worksheet

Verification Status

Students can view their FAFSA Verification status online at TruView, "Accepted Student" tab (new student) or "Student" tab (current/returning students), Student Finance section, click "Scholarships, Financial Aid & Loans" tab, click "Online Acceptance" and then click "Verification Checklist". Select the applicable year from the drop down menu.

FAILURE TO READ AND COMPLETE ALL SECTIONS OF THIS WORKSHEET WILL RESULT IN DELAYS TO YOUR VERIFICATION PROCESS AND MAY DELAY DISBURSEMENT OF FINANCIAL AID



Please do not submit W-2 forms for 2018 tax filers unless they are requested from our office. Non-tax filers are still required to submit all W-2 forms.

RETURN THIS WORKSHEET BY MAIL, EMAIL, OR FAX TO:

Truman State University
 Financial Aid Office MC 103
 100 E. Normal, Kirksville MO 63501
 E-Mail: finaid@truman.edu
 Fax: 660-785-7389

Parental Information for Dependent Students

If your parents are divorced or separated, you should provide information for the parent you lived with more during the 12 months prior to completing your FAFSA. If this parent is remarried as of the date you completed the FAFSA, you should also provide information for your stepparent.

If your legal parents (biological and/or adoptive) are not married to each other and live together, you should provide information about both of them regardless of their gender. Same-sex couples must report their marital status as married if they were legally married in a state or jurisdiction that permits same-sex marriage.

Requesting A Tax Transcript

On The Web—Go to www.irs.gov

By Phone—Call 1-800-908-9946

- The following information is needed to request a transcript—Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2018 tax return was filed).
- It takes up to 2 weeks after filing a tax return for IRS income information to be available for electronic IRS tax return filers, and up to 8-12 weeks for paper IRS tax return filers.
- Be sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript”.
- We strongly recommend that you have the transcript sent to you and then you submit a copy to our office, and keep a copy for your own records.
- Be sure to submit all pages of the transcript.

For more information on requesting a tax return transcript, go to financialaid.truman.edu and click Selection for Verification.

What To Do If You Have Trouble Obtaining A Transcript

When did you submit your 2018 return? It can take up to 8-12 weeks after filing your return before transcript information is available.

Try a different requesting method; if you were unsuccessful with the online method, the phone method may work for you.

For more assistance in obtaining a transcript, contact the Truman Financial Aid Office.

Verification Requirements For Individuals Filing An Amended Return

For individuals who have filed an amended return, additional information is needed for verification purposes. Please note, the IRS Tax Return Transcript only shows the information submitted on the original return and does not reflect changes made by the amendment. Therefore, the following items are required:

- 2018 IRS Tax Return Transcript
- A signed copy of the individual’s 1040X—Amended Return

IRS Data Retrieval

- For individuals who used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer unchanged 2018 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making corrections to the FAFSA, the Financial Aid Office will use this information instead of a tax transcript. Please note, in some instances, a transcript may still be needed.
- If you have not yet used the IRS Data Retrieval Tool, but will use it to transfer 2018 IRS income information into the student’s FAFSA instead of requesting a tax return transcript, please notify the Financial Aid Office once the FAFSA has been successfully updated with the IRS data.

Verification of Non Filing Letter

If a parent did not file a Federal 2018 Tax Return, they are required to obtain documentation from the IRS that they did not file. An IRS Verification of Non-Filing Letter provides proof that the IRS has no record of a filed 1040 for the individual. A Verification of Non-Filing Letter can be obtained by the following:

On the Web - Go to www.irs.gov and select “Get a tax transcript” under tools and then “Get Transcript Online”. You will need to create a user name.

By Mail - Print IRS Form 4506-T online at www.irs.gov. Check the box next to #7 to confirm verification of non-filing status. Complete #9 with the 2018 tax period ending 12/31/2018.

Victims of Identity Theft

IRS Tax Return Transcripts and the Data Retrieval Tool on the FAFSA are not available for victims of identity theft. An individual who is a victim of identity theft and cannot get a return transcript must contact the IRS’s Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. After the IPSU authenticates the tax filer’s identity, they can request an alternate transcript called a Transcript Database View (TRDBV). Please indicate on this worksheet that you are a victim of Identity Theft and submit the TRDBV in place of a tax return transcript.