

2018-2019 Verification Worksheet - Dependent

Your FAFSA has been selected for a review process called “Verification.”

What is Verification?

Verification is a process to confirm the information you provided on the FAFSA. Normally the U. S. Department of Education selects those FAFSAs the school must verify. The school may also select files to be verified.

Can I still receive aid?

You cannot receive aid until Verification is completed. Your financial aid could change with verification.

What must I do to complete Verification?

You must complete this Verification Worksheet and submit all requested information to Lourdes Financial Aid Office (FAO). All forms and documentation must be received at the same time, as one package, at the FAO. Incomplete packages cannot be reviewed and will be returned.

Federal IRS Tax Transcripts are now required if you did not pull your IRS federal tax information over to your FAFSA using the IRS Data Retrieval Tool when you filed your FAFSA online.

- You must contact the IRS and requests an IRS Tax Transcript. The transcripts must be sent to you. **DO NOT HAVE TAX TRANSCRIPTS SENT/FAXED DIRECTLY FROM THE IRS TO LOURDES FAO**
- Submit required IRS Tax Transcripts with all other forms and documents requested to Lourdes FAO so your Verification package is complete when received. Incomplete packages cannot be processed.



If you did NOT file taxes, you will need to request the **VERIFICATION OF NON-FILING** form from the IRS. The verification of non-filing is required if you indicated that you did not file taxes on your FAFSA.

- You must contact the IRS and requests an IRS Verification on Non-Filing. The verification can be requested online, or by filing the IRS Form 4506-T you cannot receive this by mail.

HOW TO ORDER YOUR TAX RETURN TRANSCRIPT OR VERIFICATION OF NON-FILING

The easiest way is going online and filling out the electronic form at www.irs.gov. Select “Get Transcript of Your Tax Records” and you can request your transcripts by mail or online. Or telephone 1-800-908-9946, this may take longer.

- Make sure to request the “IRS tax return transcript” (*not the “IRS tax account transcript.”*) or the “Verification of non-filing”.
 - To request the verification of non-filing through the IRS you will need to select ‘get transcript online’. You will need a credit card number, or the loan number for your home or car loan in order to use this option.
- Do not have the IRS Tax Transcript sent to Lourdes FAO
- You must turn in all verification documents in together, including IRS Tax Transcripts

HOW TO USE THE IRS DATA RETRIEVAL TOOL (DRT)

If the student has not already used the tool when he/she completed the FAFSA, go back into FAFSA.gov, log into the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student’s FAFSA.

NOTE: It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.



2018-2019 Verification Worksheet - Dependent

Your FAFSA has been selected by the U.S. Department of Education for a review process called “Verification.” **Verification must be completed before your financial aid can be finalized and before any aid will be credited to your student account.** If there are differences between your FAFSA and this information, we will update your FAFSA, recalculate your aid eligibility, and notify you of the revision.

INSTRUCTIONS: All supporting documents must be included with this form. Incomplete form/documentation cannot be accepted and will be returned. Verification cannot be completed until all requested documents are received and reviewed. Your aid cannot be processed until verification is completed. Please complete ALL sections of this worksheet, attach ALL requested documentation, sign and return to Lourdes Financial Aid Office (FAO).

Step 1 – Student Information

| | | |
|----------------------------------|---------------------|----------------|
| Student’s Last Name | First Name | Middle Initial |
| Student Home Address | Lourdes Student ID# | |
| City, | State, | ZIP |
| Phone number (include area code) | | |

Step 2 - Household Information

Dependent Students: List the persons in your parent(s)’ household. Include:

- Yourself and your parent(s) (including stepparent) even if you don’t live with your parent(s)
- Your parent(s) other dependent children, if your parents will provide more than half of their support from July 1, 2018 through June 30, 2019, or they would be required to give parental information when applying for Federal Student Aid.
- Other people if they now live with your parent(s), and your parent(s) provide more than half of their support and will continue to provide more than half of their support from July 1, 2018 through June 30, 2019
- **Include** the name of college for any household member, excluding your parent(s), who will be enrolled at least half-time in a degree or certificate program between July 1, 2018 and June 30, 2019.

(If more space is needed attach a separate page with student name and student Social Security Number or Lourdes ID on it.)

| | Family Member’s Name | Age | Relationship to Student | Name of University/College |
|---|----------------------|-----|-------------------------|----------------------------|
| 1 | | | Self | Lourdes University |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |

Step 3 – Student Income Information to be Verified *Select: 1. Tax Return Filer, or 2. Non-filer of Tax Return below*

1. TAX RETURN FILER—Important Note: If the student filed, or will file, an **amended 2016** IRS tax return, the student must contact Lourdes Financial Aid Office (FAO) before completing this section.

Instructions: Complete this section if the student, filed or will file a **2016** income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web.*

Check the item below that applies:

_____ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer **2016** IRS income information into the student’s FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. **If you use the IRS Data Retrieval Tool on FAFSA you do not need to turn in Tax Transcripts.** *(Note: IF YOU MAKE ANY CHANGES ON THE IRS INFORMATION YOU WILL BE REQUIRED TO PROVIDE A COPY OF YOUR 2016 IRS TAX TRANSCRIPT.)*

_____ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, therefore I have attached a copy of the **2016 IRS tax return transcript** to this worksheet. (Copies of income tax return forms are not acceptable.) *It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*

2. NON-FILER of TAX RETURN FILERS— Select one options from this section if the student, will not file and is not required to file a **2016** income tax return with the IRS. You will need to request a ‘Verification of Non-filing’ letter online from the IRS. You can do this on the IRS website or by filing the IRS Form 4506-T.

_____ Student was not employed and had no income earned from work in **2016**. Verification of non-filing attached

_____ I did work in **2016** but will not file a federal tax return. **Complete the table below and attach all W2 forms and Verification of non-filing letter.**

(If more space is needed, attach a separate page with your name and Social Security Number or Lourdes ID on it)

| Student’s Employer Name(s) | 2016 Amount Earned | Is IRS W2 Attached? <i>Yes or No</i> | Verification of non-filing attached? <i>Yes or No</i> |
|----------------------------|--------------------|---|--|
| | | | |
| | | | |
| | | | |
| | | | |

Step 4 – Parent’s Income Information to be Verified *Select 1. Tax Return Filer, or 2. Non-filer of Tax Return below*

Note: If two parents were reported in Step 2 of this worksheet, the instructions and certifications below refer and apply to both parents.

1. **TAX RETURN FILER—Important Note:** If the student’s parent(s) filed, or will file, an **amended 2016** IRS tax return, the student must contact Lourdes Financial Aid Office (FAO) before completing this section.

Instructions: Complete this section if the student’s parent(s) filed or will file a **2016** income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web.*

Check the item below that applies:

_____ The student’s parent has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer **2016** IRS income information into the student’s FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *In this case, Lourdes will use the IRS information that was transferred to complete your verification process. You do not need to turn in Tax Transcripts.*

_____ The parent is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, therefore I have attached a copy of the **2016 IRS tax return transcript** to this worksheet. (Copies of income tax return forms are not acceptable.) *It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*

2. NON-FILER of TAX RETURN FILERS— Select one options from this section if the student, will not file and is not required to file a **2016** income tax return with the IRS. You will need to request a ‘Verification of Non-filing’ letter online from the IRS. You can do this on the IRS website or by filing the IRS Form 4506-T.

_____ Parent was not employed and had no income earned from work in **2016**. Verification of non-filing attached

_____ Parent did work in **2016** but will not file a federal tax return. **Complete the table below and attach all W2 forms and Verification of non-filing letter.**

(If more space is needed, attach a separate page with your name and Social Security Number or Lourdes ID on it)

| Parent’s Employer Name(s) | 2016 Amount Earned | Is IRS W2 Attached? <i>Yes or No</i> | Verification of non-filing attached? <i>Yes or No</i> |
|---------------------------|--------------------|---|--|
| | | | |
| | | | |
| | | | |
| | | | |

Step 5 – Certifications and Signatures

By signing this form, I affirm that all information on this form and any attachments are complete and accurate to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. I understand that if I purposely give false or misleading information on this worksheet it may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

Student Signature (Required)

Parent Signature (Required)



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HOW TO ORDER YOUR TAX TRANSCRIPT

The easiest way is going online and filling out the electronic form at www.irs.gov under 'Tools' select/click 'Get a Tax Transcript' then under item '3' select the electronic form. Or telephone 1-800-908-9946, this may take longer.

- Make sure to request the “IRS tax return transcript” (*not the “IRS tax account transcript.”*)
- Do not have the IRS Tax Transcript sent to Lourdes FAO
- You must turn in all verification documents in together, including IRS Tax Transcripts

HOW TO ORDER YOUR VERIFICATION OF NON-FILING

The easiest way is going online and filling out the electronic form at www.irs.gov under 'Tools' select/click 'Get a Tax Transcript' then select to 'Get transcript online'. You can also complete the Form 4506-T and send it in to the IRS to request this.

- Make sure to request the “Verification of Non-Filing”
- You must turn in all verification documents in together, including verification of non-filing.

*Submit this worksheet to Lourdes Financial Aid Office (FAO)
6832 Convent Blvd. Sylvania, Ohio 43560
Phone: 419-824-3732 Fax: 419-517-8921
Email: financialservices@lourdes.edu*