

2018-2019 Verification Worksheet - Independent

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.

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.

How long does the Verification process take?

- After you have turned in your complete package of information to Lourdes FAO, the package will be reviewed by FAO’s Verification team.
- During this review, the team may need to contact you to clarify information or ask for additional documentation. Then the team can finalize the review and transmit the verified data to the U.S. Department of Education (DOE).
- DOE receives, processes, and returns a response to you in the form of an updated Student Aid Report (SAR) and also notifies Lourdes FAO. This is normally about 5 business days.
- Lourdes FAO will then review the information returned from the DOE and adjust your aid, if needed. If your aid package has changed a revised award will be created within 5 business days. Check your Web Self Service account on the Lourdes Portal.

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 on your FAFSA.

- You must contact the IRS and requests an IRS Verification on Non-Filing. The verification must be requested online or by using Form 4506-T.

HOW TO ORDER YOUR TAX 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



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2018-2019 Verification Worksheet - Independent

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).

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| Step 1 – Student Information |
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|----------------------------------|---------------------|----------------|
| Student’s Last Name | First Name | Middle Initial |
| Student Home Address | Lourdes Student ID# | |
| City, | State, | ZIP |
| Phone number (include area code) | | |

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|---------------------------------------|
| Step 2 - Household Information |
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Independent Student: List the persons in your household. Include:

- Yourself, and your spouse if you have one
- Your children if you provide more than half of their support from July 1, 2018 through June 30, 2019, even if they don’t live with you
- Other people if they now live with you, and you 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 the college for any household member who you support, 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 | | | | |

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 you (or your spouse, if married) 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 you, 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. 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.*

Check the item below that applies:

_____ I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse’s) **2016** IRS income information into my 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.)*

_____ I, the student, have not yet used the IRS Data Retrieval Tool, but I will use the tool to transfer my (and, if married, my spouse’s) **2016** IRS income information into my FAFSA once I have filed my **2016** IRS tax return. (See instructions above for information on how to use the IRS Data Retrieval Tool.) ***Lourdes cannot complete your verification process until the IRS information has been transferred into the FAFSA.*** *(Note: IF YOU MAKE ANY CHANGES ON THE IRS INFORMATION YOU WILL BE REQUIRED TO PROVIDE A COPY OF YOUR 2016 IRS TAX TRANSCRIPT.)*

_____ I, the student, am 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.

_____ 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> |
|----------------------------|--------------------|---|--|
| | | | |
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| | | | |

Student Name _____ Lourdes ID _____

Step 4 – 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)

Spouse Signature (If married spouse signature is optional.)

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*