



## Verification Worksheet – V1 Dependent 2019-2020 Academic Year

**Student Name:** \_\_\_\_\_ **ID:** \_\_\_\_\_

Last First SSN or Puget Sound ID

Your FAFSA was selected by the U.S. Department of Education for a review process called “Verification.” We are required by federal law to verify that the data provided on your FAFSA is accurate. If there are any discrepancies between your FAFSA and information provided on this worksheet, we will update your application, recalculate your aid eligibility, and notify you of any changes to your financial aid package.

This worksheet and any additional documentation required should be returned to Student Financial Services as soon as possible. All required documentation must be submitted and reviewed before verification can be completed.

**Verification must be completed before your financial aid can be applied to your student account and no later than the end of the first term of enrollment for the academic school year.** If verification is not completed, all academic year federal, state, and need-based Puget Sound aid will be canceled.

### A. Family Information

**List the people in your parents’ household, including:**

- Yourself and your parent(s) (including stepparent).
- Your parents’ other children, if (a) your parents will provide more than half of their support from July 1, 2019 - June 30, 2020, or (b) the children would be required to provide parental information when applying for Federal Student Aid.
- Other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2019 - June 30, 2020.

Provide the name of the college for any household member who will be attending college at least half-time between July 1, 2019 and June 30, 2020 and will be enrolled in a degree or certificate program.

Full Name	Age	Relationship	College 2019-20
		Self	University of Puget Sound
		Custodial Parent	Not Applicable
		Custodial Parent/ Stepparent	Not Applicable
		Sibling	
		Sibling	

## B. Student 2017 Tax and Income Information

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Check only **ONE** box below:

Check here if you filed a 2017 U.S. Income Tax Return and used the IRS Data Retrieval Tool (DRT) to transfer your 2017 IRS U.S. Income Tax Return information into your FAFSA (DRT instructions below).

Check here if you filed a 2017 U.S. Income Tax Return but are unable to or choose not to use the IRS Data Retrieval Tool (DRT) to transfer your 2017 IRS U.S. Income Tax Return information into your FAFSA and instead have provided a 2017 IRS Tax Return Transcript (Transcript instructions below).

Check here if you filed an Amended U.S. Income Tax Return 2017 (1040X).

*You must provide the following documentation:*

- ✓ 2017 IRS Tax Return Transcript from the original form you filed
- ✓ Signed copy of the 2017 IRS Form 1040X "Amended U.S. Individual Income Tax Return" filed with the IRS

Check here if you did not earn any income and were not required to file a 2017 U.S. Income Tax Return.

Check here if you earned income and received a 2017 W-2, but were not required to file a U.S. Income Tax Return.

*You must provide the following documentation:*

- ✓ Copy of your 2017 IRS Form W-2 for each source of employment.

Check here if you earned income but did not receive a 2017 W-2 and were not required to file a U.S. Income Tax Return.

- ✓ List your employer(s) and income received in 2017:

Source of Income / Employer's Name	Amount Earned in 2017
	\$
	\$

## C. Parent 2017 Tax and Income Information

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Check only **ONE** box below:

Check here if you filed a 2017 U.S. Income Tax Return and used the IRS Data Retrieval Tool (DRT) to transfer your 2017 IRS U.S. Income Tax Return information into your FAFSA (DRT instructions below).

Check here if you filed a 2017 U.S. Income Tax Return but are unable to or choose not to use the IRS Data Retrieval Tool (DRT) to transfer your 2017 IRS U.S. Income Tax Return information into your FAFSA and instead have provided a 2017 IRS Tax Return Transcript (Transcript instructions below).

Check here if you filed an Amended U.S. Income Tax Return 2017 (1040X).

*You must provide the following documentation:*

- ✓ 2017 IRS Tax Return Transcript from the original form you filed
- ✓ Signed copy of the 2017 IRS Form 1040X "Amended U.S. Individual Income Tax Return" filed with the IRS

## C. Parent 2017 Tax and Income Information (continued)

Check here if you did not earn any income and were not required to file a 2017 U.S. Income Tax Return.

*You must provide the following documentation:*

- ✓ "Verification of Non Filing Letter" from the IRS attesting that you did not file a 2017 IRS income tax return. You can obtain this online at <https://www.irs.gov/individuals/get-transcript> IRS Form 4506-T and checking box 7.

Check here if you earned income and received a 2017 W-2, but were not required to file a U.S. Income Tax Return.

*You must provide the following documentation:*

- ✓ Copy of your 2017 IRS Form W-2 for each source of employment.
- ✓ "Verification of Non Filing Letter" from the IRS attesting that you did not file a 2017 IRS income tax return. You can obtain this online at <https://www.irs.gov/individuals/get-transcript> IRS Form 4506-T and checking box 7.

Check here if you earned income but did not receive a 2017 W-2 and were not required to file an Income Tax Return.

*You must provide the following documentation:*

- ✓ "Verification of Non Filing Letter" from the IRS attesting that you did not file a 2017 IRS income tax return. You can obtain this online at <https://www.irs.gov/individuals/get-transcript> IRS Form 4506-T and checking box 7.
- ✓ List your employer(s) and income received in 2017:

Source of Income / Employer's Name	Amount Earned in 2017
	\$
	\$

## D. Next Steps

Schools must verify FAFSA data with information provided directly from the IRS. If you checked that you have filed a 2017 U.S. Income Tax Return you must retrieve your IRS data using one of the following two options: IRS Data Retrieval Tool or requesting a Tax Return Transcript.

### Option 1: IRS Data Retrieval Tool – FAST – EASY – ACCURATE

The easiest way to verify your FAFSA data with accurate tax information is by using the IRS Data Retrieval Tool:

- ✓ Log in at [www.FAFSA.gov](http://www.FAFSA.gov)
- ✓ Click **Make FAFSA Corrections** located in the middle of the page.
- ✓ In the Financial Information section, answer the eligibility questions and click **Link to IRS**.
- ✓ **Proceed to IRS Site**, enter the requested information, and click **Submit**
- ✓ Review information retrieved from your tax return and click **Transfer Now**
- ✓ Complete the process on the Sign and Submit tab of your FAFSA

**Option 2: Tax Return Transcript** - If you do not want to use the IRS Data Retrieval Tool or you are not eligible to use the tool, you must provide a 2017 Tax Return Transcript along with this verification worksheet. Tax filers can request a free transcript of their 2017 tax return from the IRS via:

#### Telephone:

- ✓ Automated Telephone Request – 1-800-908-9946.
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

#### Get Transcript by Mail

- ✓ <https://www.irs.gov/individuals/get-transcript>
- ✓ 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.

## D. Next Steps (continued)

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### Get Transcript Online

- ✓ <https://www.irs.gov/individuals/get-transcript>
- ✓ 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) in the user's name, and (3) specific financial account numbers (such as a 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.

### Paper Request Form:

- ✓ IRS Form 4506T-EZ <https://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- ✓ IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- ✓ The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

**NOTE:** If you are married and you and your spouse filed separately on your 2017 U.S. Income Tax Return, you must provide a 2017 IRS Tax Return Transcript for both you and your spouse in order to complete verification.

## E. Certification and Signatures

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Each person signing this form certifies that all of the information reported on it is complete and correct. The student and at least one parent must sign and date. Please use a pen to complete, electronic or typed signatures are not acceptable.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## F. Submission Instructions

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- Please use one of the following options to submit your completed paperwork to SFS (originals are *not* required):
  - Attachment via Email: [sfs@pugetsound.edu](mailto:sfs@pugetsound.edu)
  - Fax: 253-879-8508
  - Mail: Student Financial Services 1500 N. Warner Street #1039 Tacoma, WA 98416
  - In Person: Jones Hall 019 (bottom floor)

Warning: If you purposely give false or misleading information on this form, you may be subject to a fine, imprisonment, or both.