



Verification Worksheet – V5 Dependent 2019-20 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 2019-2020
		Self	University of Puget Sound
		Custodial Parent	Not Applicable
		Custodial Parent/ Stepparent	Not Applicable
		Sibling	
		Sibling	

B. Student 2017 Tax and Income Information

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 an 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 an 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

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.

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.

C. Parent 2017 Tax and Income Information (continued)

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. High School Completion Status

Provide one of the following documents to indicate the student's high school completion status at the time the student will begin college in 2019–2020:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate or GED transcript.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If the student completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.

If the student is unable to obtain the documentation listed above, they must contact our financial aid office.

E. Identity and Statement of Educational Purpose

Identity and Statement of Educational Purpose (To Be Signed at our Financial Aid Office)

The student must appear in person at the University of Puget Sound to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

E. Identity and Statement of Educational Purpose (continued)

In addition, the student must sign, in the presence of the institutional official, the Statement of Education Purpose provided below:

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student's Name)

Statement of Educational Purpose and that the Federal student financial assistance that I may receive will only be used for educational purposes and to pay the cost of attending the University of Puget Sound for 2019-2020.

(Student's Signature)

(Date)

(Student's UPS ID Number)

F. 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.

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

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

G. Certification and Signatures

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: _____

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