



## VERIFICATION WORKSHEET DEPENDENT (V1)

### 2020 - 2021

Your **2020/2021** Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

### Dependent Student Information

Student's Last Name	Student's First Name	Student's M.I	Last 4 of Student's Social Security Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Phone Number (include area code)			Student's Alternate Phone Number

### Dependent Student Number of Household Members and Number in College

Number of Household Members: List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2020, through June 30, 2021, or if the other children would be required to provide parental information if they were completing a FAFSA for 2020–2021. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2021.

Number in College: Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2020, and June 30, 2021, and include the name of the college.

*If more space is needed, attach a separate page with your name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Enrolled at Least Half Time in 20/21 ?
<i>Marty Jones(example)</i>	<i>28</i>	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>	Metro Technology Centers	Yes

**\*\*Note:** We will require additional documentation for additional household member enrolled in college such as their schedule.



## VERIFICATION WORKSHEET DEPENDENT (V1)

### Dependent Student's Income Information to Be Verified

Please select one of the following:

- The student filed a 2018 federal tax return.
- The student did not file 2018 federal tax return.
- The student filed an amended 2018 federal tax return.
- The student filed a non-IRS tax return (e.g., a tax return for a foreign country).
- The student is a victim of IRS identity theft.
- The student was granted a filing extension by the IRS.

### Verification of 2018 IRS Income Tax Return Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.

Instructions: Complete this section if the student and spouse filed or will file a 2018 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

#### Check the box that applies:

- The student has used the IRS DRT in FAFSA on the Web to transfer 2018 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the institution with a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules.

#### A 2018 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "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.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

- Check here if a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules is provided.
- Check here if a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules will be provided later.



## VERIFICATION WORKSHEET DEPENDENT (V1)

### Verification of 2018 Income Information for Student Non-tax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2018 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2018.
- The student and/or spouse were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

*If more space is needed, provide a separate page with the student's name and ID number at the top.*

Employer's Name	2018 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
<i>Total Amount of Income Earned from Work:</i>		

**\*You MUST provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.**

Check here if confirmation of non-filing is provided.

Check here if confirmation of non-filing will be provided later.

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2018 must provide a signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return;
- A 2018 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2018 IRS Form 1040 and the applicable schedules that were filed with the IRS.

### Individuals (Students &/or Parents) Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.



## VERIFICATION WORKSHEET DEPENDENT (V1)

### Individuals (Students &/or Parents) Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2018 income tax return and applicable schedules the individual filed with the IRS; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

### Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2018 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2018, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2018;
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2019 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2018 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2018.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2018 tax account information.

### Parent's Income Information to Be Verified

Please select one of the following:

The parents filed a 2018 federal tax return.

The parents did not file a 2018 federal tax return.

The parents filed an amended 2018 federal tax return.

The parents filed a non-IRS tax return (e.g., a tax return for a foreign country).

The parents are a victim of IRS identity theft.

The parents were granted a filing extension by the IRS.

### Verification of 2018 IRS Income Tax Return Information for Parent Tax Filers

**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.

**Instructions:** Complete this section if the parents filed or will file a 2018 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.



## VERIFICATION WORKSHEET DEPENDENT (V1)

**Check the box that applies:**

The parents have used the IRS DRT in FAFSA on the Web to transfer 2018 IRS income tax return information into the student's FAFSA.

The parents have not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.

The parents are unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the institution with a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules.

**Check here if a 2018 IRS Tax Return Transcript(s) or a 2018 Signed Tax Form and schedules is provided.**

**Check here if a 2018 IRS Tax Return Transcript(s) or 2018 Signed Tax Form and schedules will be provided later.**

### Verification of 2018 Income Information for Parent Non-tax Filers

*The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2018 income tax return with the IRS.*

**Check the box that applies:**

Neither parent was employed, and neither had income earned from work in 2018.

One or both parents were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. **[Provide copies of all 2018 IRS W-2 forms issued to the parents by their employers]**. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned from Work		\$

Check here if confirmation of non-filing is provided.

Check here if confirmation of non-filing will be provided later.

**You MUST provide documentation from the IRS that indicates a 2018 IRS income tax return was not filed with the IRS. This can be obtained with the same instructions as obtaining a IRS Tax Transcript noted in section above.**



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### Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date this worksheet.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

\_\_\_\_\_  
Student's Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

***Submit this worksheet to:***

***Metro Technology Centers – Office of Financial Aid  
1900 Springlake Drive  
Oklahoma City, OK, 73111***

***OR Save, then Click Upload to submit to  
our Secure Google Drop Box:***

**UPLOAD**