



Student Financial Services | 715 North Avenue | New Rochelle, NY 10801 | 914.633.2497 | fax 914.885.1065 | sfs@iona.edu | www.iona.edu

2019–2020 Independent Verification Worksheet

Any financial aid awarded prior to verification is tentative. Student Financial Services has the right after reviewing your verification information to request additional documentation and to change or cancel your awards. Changes in funding, administrative/technical errors, changes in application information, enrollment status or reclassification in residency will affect your financial aid award and may result in a revised financial aid award. You can monitor your verification status on your PeopleSoft “To Do” List. **All required verification documents must be submitted to and processed by Student Financial Services by July 15, 2019.**

A. Independent Student’s Information

_____ , Student’s Last Name	_____ Student’s First Name Student’s M.I.
_____ Student’s ID Number	_____ Student’s Social Security Number
_____/_____/_____ Student’s Date of Birth	_____ Student’s Email Address
_____ Student’s Street Address, City, State, Zip Code (include apt. no.)	
(_____-_____-_____)_____ Student’s Home Phone Number	(_____-_____-_____)_____ Student’s Alternate or Cell Phone Number

B. Independent Student’s Family Information

List the people in your household. Include:

- Yourself
- Your spouse (if married)
- Children if you will provide more than half of their support from July 1, 2019 through June 30, 2020 and indicate if they will attend college for *undergraduate* study in 2019/2020 academic year
- Other people who now live with you, if you will provide more than half of their support from July 1, 2019 through June 30, 2020

If more space is needed, attach a separate page with the Student’s Name and Student ID# at the top.

Full Name	Age	Relationship	College	Will Be Enrolled At Least Half Time
<i>Example: Amber Lynn Scott</i>	<i>18</i>	<i>Wife</i>	<i>General University</i>	<i>Yes</i>
		Self		

Student's Name: _____ ID# _____

Important information regarding tax data and verification for students and spouses:

▪ *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 www.FAFSA.ed.gov. If you are not eligible to use the DRT, please follow steps below to obtain a Federal Tax Return Transcript, or provide signed copies of your Federal Tax Return 1040's for 2017.*

▪ *The Dependent Verification Worksheet must be submitted whether or not you use the DRT.*

▪ *Please follow the below instructions to obtain a tax return transcript:*

♦ **Get Transcript by Mail** -- Go to www.IRS.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

♦ **Get Transcript ONLINE** -- Go to www.IRS.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Follow all authentication steps as required. Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

♦ **Telephone Request** - 1-800-908-9946

♦ **Paper Request Form** - Go to www.irs.gov and print IRS Form 4506T-EZ or IRS Form 4506-T and submit to the IRS

▪ *When requesting tax return transcripts, use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2017 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2017 IRS income tax return). You may be eligible to print your tax return transcript upon account access. If not, your request will be mailed to you in 5-7 business days. **If both student and spouse filed separate 2017 returns, tax return transcript(s) must be provided for both student and spouse.***

C. Independent Student's Income Information to Be Verified

Student 2017 Tax and Income Information: Please Check ✓ One

The student has used the DRT **OR** The student has attached a 2017 IRS Tax Return Transcript(s) or signed Federal Tax Return 1040's

Student 2017 Non-Filers Section:

You must complete this section if you did not file and were not required to file a 2017 income tax return with the IRS:

I, _____, declare that I did not and was not required to file a tax return for 2017. If employed in 2017, I am listing below any employers and income earned in 2017, as well as providing the associated W2 forms for 2017.

If the student did not file a tax return for 2017, he/she **MUST** obtain Non-Filers statement for 2017. You must provide documentation from the IRS dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS. Documentation includes a verification of non-filing letter from the IRS. See instructions on page 3. Provide all copies of W2's issued for 2017.

Employer's Name/ Income Source	2016 Amount Earned	Was IRS W-2 Provided
<i>Example: Dillon's Food Truck</i>	<i>\$3,013.83</i>	<i>Yes</i>

Student Signature for Non-filers declaration: _____ Date: _____

Student's Name: _____ ID# _____

D. Spouse's Income Information to Be Verified

▪ If the student and spouse filed separate 2017 IRS income tax returns, 2017 IRS Tax Return Transcripts must be provided for both student and spouse.

Spouse 2017 Tax and Income Information: Please Check One

The spouse has used the DRT **OR** The spouse has attached a 2017 IRS Tax Return Transcript(s)

Spouse 2017 Non-Filers Section:

You must complete this section if you did not file and were not required to file a 2017 income tax return with the IRS:

I, _____, declare that I did not and was not required to file a tax return for 2017. If employed in 2017, I am listing below any employers and income earned in 2017, as well as providing the associated W2 forms for 2017.

If the student's spouse did not file a tax return for 2017, he/she **MUST** obtain Non-Filers statement for 2017. You must provide documentation from the IRS dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS. Documentation includes a verification of non-filing letter from the IRS. See instructions on page 3. Provide all copies of W2's issued for 2017.

Employer's Name/Income Source	2016 Amount Earned	Was IRS W-2 Provided
<i>Example: Dillon's Food Truck</i>	<i>\$3,013.83</i>	<i>Yes</i>

Spouse Signature for Non-filers declaration: _____ Date: _____

G. Certification and Signatures

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

Student's Signature

Date

Spouse's Signature (optional)

Date

Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records.

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

****Verification of 2017 IRS Income Tax Return Information for Individuals with Unusual Circumstances****

-Verification of 2017 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2017, provide both of the following:

- A 2017 IRS Tax Return Transcript for the 2017 tax year; and
- A signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

-Verification of Non-filers for 2017 IRS Income Tax Return Information

- Visit www.irs.gov and follow steps to request a tax return transcript for 2017; or
- Complete form 4506-T Request for Tax Return Transcript (available at www.irs.gov) and mail it to the address on the form
- Either option will generate a non-filers letter for tax year requested, provide this letter to SFS

-Verification of 2017 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

- A victim of IRS identity theft who is not able to obtain a **2017 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS Identity Protection Specialized Unit at 1-800-908-4490 to obtain a Tax Return Data Base View of 2017 IRS income tax return information (a TRDBV version transcript.)
- A statement signed and dated by the tax filer indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

-Verification of 2017 IRS Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns

- An individual who filed or will file a 2017 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2017 income tax return(s).

****Other forms are available at www.iona.edu/onlineforms**

****Other resources:** Internal Revenue Service: www.irs.gov; 1-800-829-1040. FAFSA: www.fafsa.ed.gov; 1-800-4-FED-AID Student Financial Services: www.iona.edu/Student-Life/Student-Financial-Services; 914-633-2497; sfs@iona.edu