



BELMONT UNIVERSITY
Student Financial Services

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1900 Belmont Blvd. Nashville, TN 37212
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2019 - 2020 VERIFICATION WORKSHEET

Your application was selected for review in a process called “Verification.” In this process, the university will be comparing information from your application with signed copies of you and your parent(s)’ 2017 Federal Income Tax Return Transcript, W-2 form(s), and other financial documents. The law says we have the right to ask you for this information before awarding Federal Aid. If there are differences between your application information and your financial documents, you or the university may need to make corrections electronically or by using your Student Aid Report (SAR). Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won’t be delayed. Your financial aid administrator will assist you.

What you should do

1. Collect you and your parent(s)’ financial documents (Federal Income Tax Return Transcript, 1040 Tax Return, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet(s)—you and at least one parent.
4. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.

A. Student Information

BU-ID Number: _____

 Last Name First Name M.I.

 Social Security Number

 Address (include Apt. No.)

 Date of Birth

 City State ZIP Code

 Telephone Number (include Area Code)

B. Family Information

List below the people in the parent’s 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, 2019, through June 30, 2020, or if the other children would be required to provide parental information if they were completing a FAFSA for 2019–2020. 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 their support and will continue to provide more than half of their support through June 30, 2020.

For any household member, excluding the parents, who 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, 2019, and June 30, 2020**, include the name of the college.

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

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		Self		

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: US Department of Education, Washington, DC 20202-5345.

C. Student’s Income Information to Be Verified

1. TAX RETURN FILERS—Important Note: If you have filed, or will file, an amended 2017 Federal Income Tax Return, you must contact the financial aid administrator before completing this section.

Instructions: Complete this section if you, filed or will file a 2017 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 you have not already used the tool, Please do the following: Go to FAFSA.gov, log into child’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2017 IRS income tax information into your FAFSA. 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 box below that applies:

- Check here if you have not and will not file a 2017 Federal Income Tax Return. Please proceed to Section 2.
- If you have used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student’s FAFSA.
- If you have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2017 IRS income tax return information into the student’s FAFSA.
- If you are unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2017 Tax Return or IRS Tax Return Transcript(s)**.

A 2017 IRS Tax Return Transcript may be obtained through:

- 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.” 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, under the Tools heading, click "Get a tax 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.
- 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 **2017 Tax Return OR 2017 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2017 Tax Return OR 2017 IRS Tax Return Transcript(s)** will be provided later.

2. TAX RETURN NON-FILERS—Complete this section if you will not file and are not required to file a **2017 Federal Income Tax Return.**

Check the box that applies:

- I was not employed and had no income earned from work in year 2017.
- I was employed in 2017 and will list below the names of my employer(s), the amount earned in 2017, and whether an IRS W-2 form is attached. Attach copies of all 2017 IRS W-2 forms issued. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with Name and Student ID No. at the top.*

Employer’s Name	2017 Amount Earned	IRS W-2 Attached?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

D. Parent's Income Information To Be Verified

Note: If both parents are reported in Section B of this worksheet, then the instructions and certifications below refer and apply to both parents.

1. **Parent TAX RETURN FILERS**—**Important Note:** If your parent(s), filed or will file, an amended 2017 Federal Income Tax Return, then your financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if your parent(s) filed or will file a 2017 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 your parent(s) have not already used the tool, then you and your parent should go to FAFSA.gov, log in to 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 your parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into your FAFSA.*

Check the one box below that applies:

- Check here if you have not and will not file a 2017 Federal Income Tax Return. Please complete the Non-Tax Filers statement in addition to this worksheet and proceed to Section 2.
- Your parent (s) have used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student's FAFSA.
- Your parent (s) have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2017 IRS income tax return information into the student's FAFSA.
- Your parent (s) are unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2017 Tax Return or 2017 IRS Tax Return Transcript(s)**

A **2017 IRS Tax Return Transcript** may be obtained through:

- **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." 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, under the Tools heading, click "Get a tax 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.
- **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.

If the parents filed separate 2017 IRS income tax returns, the IRS DRT cannot be used and the **2017 IRS Tax Return Transcript(s)** must be provided for each.

- Check here if a **2017 Tax Return OR 2017 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2017 Tax Return OR 2017 IRS Tax Return Transcript** will be provided later.

Dependent

2. **Parent TAX RETURN NON-FILERS with LOW or NO Income**—Complete this section if your Parent(s) will not file and is not required to file.

Check the box that applies:

Your parent(s) was not employed and had no income earned from work in year 2017.

Your parent(s) was employed in 2017 and did not file a 2017 Federal Income Tax Return.



IF EITHER BOX APPLIES TO YOUR PARENTS, PLEASE HAVE YOUR PARENTS COMPLETE THE NON TAX FILERS STATEMENT FORM.

E. **Parent's Income Information To Be Verified** (please check all that apply)

1. Did you or your parent(s) make payments to tax-deferred pensions/savings plans (ex. 401k; 403b) in 2017? ____ YES ____ NO

Parent	Student
Amount Paid: \$	Amount Paid: \$

F. **Sign this Worksheet**

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

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

Student

Date

Parent

Date

Don't forget to sign your forms!