Independent

BELMONT UNIVERSITY
Student Financial Services

Student Financial Services
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2019 – 2020 Verification Worksheet

Your application was selected for review in a process called "Verification." In this s process, your school will be comparing information from your application with signed copies of your (*and your spouse's, if you are married*) 2017 Federal tax forms, and with W-2 forms or 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 your school 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 help you.

What you should do

1. Collect your (and your spouse's) financial documents (Federal Income Tax Transcript or 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).
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 **student' s household** . Include:

The student.

The student's spouse, if the student is married.

The student's or spouse's children if the student or spouse will provide more than half of their support from **July 1, 2019, through June 30, 2020,** even if the children do not live with the student.

Other people if they now live with the student and the student or spouse provides 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 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		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate

C. Student's Income Information to Be Verified

1. **TAX RETURN FILERS**—**Important Note:** If you (or your Spouse, *if married*) 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, the student, 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, go to FAFSA.gov, log into your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, 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 that applies:

☐ **Check here if you have not and will not file a 2017 Federal Income Tax Return. Please proceed to Section 2.**

☐ I, the student have used the IRS DRT in *FAFSA on the Web* to transfer my (and if married, my spouse's) 2017 IRS income tax return information into my FAFSA.

☐ I, the student have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer my (and if married, my spouse's) 2017 IRS income tax return information into my FAFSA.

☐ I, the student am 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 student and spouse 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 IRS Tax Return Transcript(s) or 2017 Federal Income Tax Return** is provided.
☐ Check here if a **2017 IRS Tax Return Transcript(s) or 2017 Federal Income Tax Return** will be provided later.

2. **Student who is a TAX RETURN NON-FILER**—**Please complete the Non-Tax Filers Statement Form**

D. Student's Income Information to Be Verified *(please check all that apply)*

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

Student	Spouse
Amount Paid: $	Amount Paid: $

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

E. Sign this Worksheet

I certify that all of the information reported on this worksheet is complete and correct.
The student must sign this worksheet.
If married, your spouse's signature is optional.

______________________________ ______________________

Student's Signature **Date**

______________________________ ______________________

Spouse Signature **Date**