



**Financial Aid, Student Employment  
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## **Addendum to 2019-20 Verification**

Effective January 9, 2019, the Department of Education released guidance to reduce burden on students and families having difficulty obtaining documentation needed to verify their FAFSA information. The information below can now be used to satisfy verification requirements for the 2019-20 academic year.

### **Federal Income Tax Returns**

2017 **SIGNED** Federal Income Tax Returns can now be accepted for verification purposes.

### **Verification of Non-Filing Status**

Individuals who did not file a federal tax return are still required to obtain verification of non-filing from the IRS.

**However**, if an individual is unable to obtain a verification of non-filing letter from the IRS, they can provide a **signed statement** certifying that:

1. They attempted to obtain a verification of non-filing letter from the IRS, but were unsuccessful; **and**
2. They have not and are not required to file an income tax return for 2017.

If a non-filer had earnings from work, W-2s from each source of income must be provided.

Example: You completed a 4506-T form and submitted it to the IRS and after 5-10 days have not received a response. You can utilize the statement on the back of this form to help document the scenario. This statement certifies that you made an attempt but were unable to obtain this information.

## 2019-20 Non-Filing Statement With Earnings from Work

Student Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

I, \_\_\_\_\_, certify that I attempted to obtain a verification of non-filing letter from  
(print name of non-filer)  
the IRS and have not received a response. Please explain your attempt below:

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In addition, I certify that I did not file, and was not required to file, a 2017 federal income tax return. Listed below is information about the income I earned in 2017:

Individual's Name	Name of Employer	Income Earned in 2017

**\*\* Attach copies of 2017 W-2s from each source of employment income\*\***

Non-filer Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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## 2019-20 Non-Filing Statement With No Earnings from Work

Student Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

I, \_\_\_\_\_, certify that I attempted to obtain a verification of non-filing letter from  
(print name of non-filer)  
the IRS and have not received a response. Please explain your attempt below:

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In addition, I certify that I did not file and was not required to file a 2017 federal income tax return. I was not employed in 2017. I did not earn any income in 2017 and have no W-2s to provide.

Non-filer Signature: \_\_\_\_\_

Date: \_\_\_\_\_



**Section C – Student and Spouse (if married) Income Information**

Please check the appropriate box for you and your spouse (if married) (**only check one box per column**). Please refer to the instructions for more detailed information on options.

**2017 Tax Filers****Student****Spouse**

I already completed the **FAFSA IRS Data Retrieval (DRT)** process. **Please List Date Completed:**

I have attached my 2017 IRS Tax Return Transcript **or SIGNED** copy of 2017 Federal Tax Return. List student ID#/ name on transcripts as IRS does not print identifying information on forms.

I filed a **2017 amended return**, have an extension, filed a foreign tax return, or cannot obtain a tax transcript due to IRS identity theft. I have provided the necessary documentation per the instructions.

**2017 Non Tax Filers**

I did earn income from work in 2017. I did not and was not required to file a 2017 Federal Income Tax Return per the IRS. **You must list all income sources/amounts below and attach all 2017 W-2 and 1099 Mics. forms. You/spouse(if applicable) must also submit an IRS Verification of Non-filing letter.** Include student ID#/name on non-filing letter.

Individual's Name	Name of Employer	Income in 2017

I did earn income from work in 2017, but do not have any W2 form(s) or 1099 Misc. forms (Ex. babysitting job, lawn job). I certify that I am not considered self-employed and I did not and was not required to file a tax return. **You/spouse (if applicable) must also submit an IRS Verification of Non-filing letter.** Include student ID#/name on non-filing letter.

Individual's Name	Name of Employer/Job Performed	Income in 2017

I did not earn any income from work in 2017. **You/spouse (if applicable) must also submit an IRS Verification of Non-filing letter.** Include student ID#/name on non-filing letter.

To obtain an **IRS Verification of Non-filing letter**, you will need to complete [IRS form 4506-T](#) (be sure to mark box 7 for Verification of Non-filing and enter appropriate ending year which would be 12/31/2017 for 2017). Make sure to read all instructions on the form and to mail to the appropriate IRS Team. **Do not return the 4506-T form to the Financial Aid Office or request for the non-filing letter to be sent to us. \*\*Exceptions to non-filing letter, please refer to verification worksheet instructions.** Be sure to list student ID# and name on all non-filing letters and submit to Financial Aid Office.

**Section D – Student and Spouse (if married) Signatures**

By signing this worksheet, I/we certify the information reported is correct to the best of our knowledge. If the Department of Financial Aid, Student Employment and Military Benefits notices a discrepancy, I/we understand corrections to the FAFSA will be submitted directly to the U.S. Department of Education. Additionally, I/we understand that any such corrections may also warrant an adjustment to any financial aid that has already been offered for the 2019-20 academic year.

Student Signature

Date

Spouse Signature (Optional)

Date

NOTE: Signatures cannot be typed or stamped. Must be signature.

# 2019-20 Independent Verification Worksheet Instructions

## 1. You must complete the attached Independent Verification Worksheet

- All questions must be answered
- You must sign and date the form
- Make sure to include your student ID# and name on all documents submitted

## 2. Additional Guidance for Section C

Provide 2017 Tax Information for yourself and spouse (if married) using **A** or **B** unless not required to file per the IRS regulations (check appropriate box on Verification Worksheet).



**A**

### **IRS Data Retrieval Tool (DRT) for Free Application for Federal Student Aid (FAFSA)**


Certain exclusions apply and if you are unable to use, please see option B.

**\*\*The data that is transferred from the IRS will not be viewable due to enhanced security of sensitive information. Once the data is transferred, "Transferred from the IRS" will be in place of any other information.\*\* Do not correct transferred information. You will receive a letter in the mail letting you know that DRT has retrieved your tax information.**

1. Log onto [www.fafsa.gov](http://www.fafsa.gov)
2. Select "[Make FAFSA Correction](#)"
3. Select Financial Information Tab
4. Answer the questions accordingly

5. If the  icon does not appear  **You will need to order 2017 IRS Tax Return Transcript(s), see option**

**B**

6. If the  icon appears, select "link to IRS" button
7. Select proceed to IRS site and Press "OK"
8. Exactly as reported on the tax form enter: address, city, state, and zip code
9. Then check "*Transfer My Tax Information into the FAFSA*"
10. Click "*Transfer Now*" button
11. Proceed to the end of FAFSA application then submit
12. Make sure the confirmation page appears after clicking the submit button

**B**

### **Contact IRS to Request 2017 IRS Tax Return Transcript using one of the following:**

- Online: at <http://www.irs.gov/Individuals/Get-Transcript>
  - Select "Get Transcript by Mail" or "Get Transcript Online" Please note, some individuals may not be able to obtain online.
  - Enter appropriate information
  - Select "**Return Transcript**" for "**2017**" tax year
  - Please be aware that it will take between 5 to 10 days for the IRS to mail
- By Phone: Call 800-908-9946
- By Mail: Complete and submit form 4506-T or 4506T-EZ to the IRS

**Be sure to list student name and ID # on all transcripts as the IRS does not print identifying information on the transcript.**

### **IRS Verification of Non-filing letter (Exceptions)**

If you are unable to obtain a non-filing letter due to not having a Social Security Number, Individual Taxpayer Identification Number, or an Employer Identification Number you must submit the following:

A signed and dated statement (**by spouse, if married**), certifying that the individual(s) does not have a Social Security Number, an Individual Taxpayer Identification Number, or an Employer Identification Number and the statement must list the sources and amounts of earnings, other income and resources that supported the individual(s) for the 2017 tax year. Also, provide a 2017 W-2 for each source of employment income, if applicable.

# Unusual Tax Filing Situations

## For Individuals Granted a Filing Extension by the IRS for 2017

Typically the IRS allows for a six month extension of time to file your return (**October 15, 2018**). Once this date is past, we would require you to submit copies of your IRS tax transcript or utilize the IRS DRT process. Some exceptions may apply to this.

An individual who is required to file a 2017 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- **A copy of the IRS Form 4868**, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2017;
- **A copy of the IRS's approval of an extension beyond the automatic six-month (October 15, 2018) extension** if the individual requested an additional extension of the filing time for the tax year 2017;
- **IRS Verification of Non-filing Letter** (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2018, obtained by completing [IRS form 4506-T](#) ;
- **A copy of IRS Form W-2 for each source of employment** income received for the 2017 tax year. If self-employed, would need to provide a signed statement detailing the amount of business income to be listed on line 12 of the 2017 Federal 1040 Tax Form; **and**
- **A signed and dated statement (by student and spouse, if married)** certifying the estimated amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the 2017 tax year. For the AGI this would be the amount on line 37 for the 1040 tax form. For taxes paid, this would be the amount on line 56 of the 1040 tax form. If you file a 1040A or 1040EZ, list the amounts on equivalent line of the appropriate tax form used.

*Example: For the 2017 tax year, I (insert name) and my spouse (if married, insert name) have been granted an extension from the IRS. Listed below are the best estimates at this time for the following:*

<i>Student income from work:</i>	<i>Estimated Adjusted Gross Income:</i>
<i>Spouse income from work:</i>	<i>Estimated U.S. Income Taxes Paid:</i>

## For Individuals Who Filed an Amended 2017 IRS Income Tax Return

If an individual filed an amended IRS Federal Income Tax Return for tax year 2017, provide both items:

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

## For Individuals Who Were Victims of IRS Identity Theft

If an individual was a victim of IRS Identity Theft, provide both items:

- A copy of the **Tax Return Database View** (TRDBV) transcript for 2017
  - Note: A victim of IRS identify theft must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the required tax filer's 2017 IRS income tax return information (TRDBV).
- **A signed and dated statement (by student and spouse, if married)** indicating the individuals were a victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft.

*Example: I, (insert your name), was a victim of IRS tax-related identity theft and the IRS has been made aware of this tax-related identity theft.*

## For Individuals Who Filed Non-IRS Income Tax Returns for 2017

If an individual 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 (in which a tax transcript is provided free of charge), please provide a signed copy of that 2017 income tax return. You also need to convert amounts to U.S. Currency and detail the equivalent line of the following information:

<i>Student income from work:</i>	<i>Adjusted Gross Income:</i>
<i>Spouse (if married) income from work:</i>	<i>Income Taxes Paid:</i>