



2019-2020 Verification Worksheet - Independent Student FAQ's

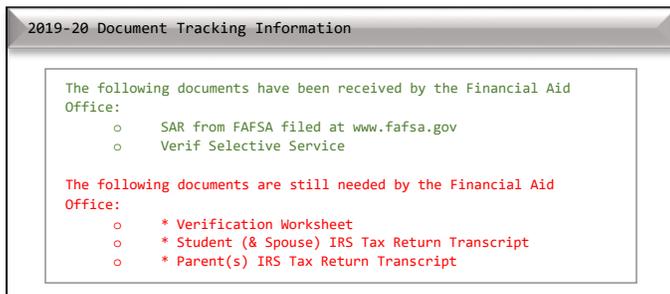
Your 2019-2020 FAFSA was selected for verification, a process in which the financial aid office must obtain documentation to ensure accuracy of the information submitted on the FAFSA. Information provided on the FAFSA will be compared with required documents (2017 IRS Tax Returns, W2s, etc.). If there are differences, your FAFSA information may need to be electronically corrected.

Why was I selected for Verification?

The main reasons for being selected for verification include that you were chosen randomly, the FAFSA you submitted was incomplete, your FAFSA contains estimated information or the data you provided on the FAFSA is inconsistent. Verification is a federal regulation. Students who are selected for verification are not being punished; rather, verification prevents ineligible students from receiving aid by reporting inaccurate information and ensures that eligible students receive all of the aid for which they are qualified.

What documents should be submitted?

You will be notified via email by the Financial Aid office. You can also check your Student Campus Connect under Acct Info/Review Financial Aid, Select 1920 Aid Year. The Document Tracking Information will list out documents needed including those related to Verification.



What happens if I do not complete verification?

Students who do not complete verification during the 2019-20 year cannot receive state, federal and some institutional financial aid for the entire 2019-20 year. Students can still attend class without completing verification, but those students must find an alternative method of payment for school besides financial aid. Students must complete verification by June 15, 2020. However, delays in submitting documents could result in ineligibility due to timing of file receipt and/or completion and late penalties may be applied to your student account if you fail to make satisfactory payment arrangements with the Business Office.

What is the IRS Data Retrieval Tool (DRT) and how do I use it?

The IRS Data Retrieval Tool (DRT) allows students and their spouse to access IRS tax return information and transfer it directly into their FAFSA. You are ineligible to use the DRT if you are married but filed separately or if your marital status has changed as of January 1. We highly recommend using this tool as you won't need to provide a copy of your or your spouse's Tax Return or Tax Transcript if selected for verification.

What if my spouse or I applied for a tax extension?

If you and/or your spouse have requested an extension to file, you must submit the following to continue with your verification:

- A copy of 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;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or a Signed statement indicating you tried to get a verification of non-filing letter and statement that you have not filed.
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2017;
- A copy of IRS Form W-2 for each source of employment income received for tax year 2017. 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 2017.

How do I request a copy of my Tax Transcript or Verification of Non-filing?

IRS Tax Returns and IRS Tax Transcripts can be requested one of several ways: 1)- **Online** through <http://www.irs.gov>. Under the "Tools" section, select "Get a Tax Transcript" 2)- **By mailing** in Form 4506-T or 4506T-EZ to the IRS. For a Verification of Non-filing you must use Form 4506-T and check box 7. 3)- **By calling** 1-800-908-9946 4)- **In person** at your local IRS office. Generally you will need to make an appointment to go in person

Can I submit my Tax Return instead of Tax Transcript?

Yes, we can now take in SIGNED 2017 1040/1040a/1040ez instead of Tax Returns transcripts. Also, if you did not file and you are not able to get a Verification of Non-filing letter you can submit a Signed statement indicating you tried to get a verification of non-filing letter and statement that you have not filed.

What if I (or my spouse) was a victim or tax-related identity theft?

Obtain a TRDBV Transcripts by contacting the IRS Identity Protection Specialized Unit (1-800-908-4490)

What Happens after I submit the documents to Financial Aid

If necessary, we may request additional information and/or documentation to resolve any discrepancies that arise during the processing of your paperwork. In the event we must contact you, please respond to these requests as quickly as possible as failure to do so will only further delay disbursement of your financial aid. Once all documents are submitted for processing, turnaround time is within 7-10 business days. A follow up email will be sent once verification is complete explaining any changes in EFC and/or awarding if necessary.



2019-2020 Verification Worksheet - Independent Student

A. Student's Information

Last Name _____ First Name _____ MI _____
 Social Security # _____ - _____ - _____ Date of Birth: ____/____/____ Email Address _____
 Contact # _____ Secondary # _____

B. Family Information

Include yourself, your spouse, children, and other people as part of your household only if you provide more than half of their support, and will continue to provide more than half of their support between July 1, 2019 and June 30, 2020.

Full Name	Age	Relationship	College – if attending at least ½ time in 2019-20)
Student's Name:		Self	East Texas Baptist University

If more space is needed, attach a separate page.

Tax Return Filers - both student and/or spouse: Either LINK Tax return to FAFSA OR Submit Documents

1. Link the 2017 Tax Return Transcript using the Data Retrieval Tool (DTR) by accessing the student's FAFSA online at fafsa.gov. The DTR is found under the Financial Information section of the FAFSA. Electronically sign and submit the corrected FAFSA to ETBU. This option takes 2 business days to be sent to the school.

OR
2. You have the option of submitting either (1) The 2017 TAX RETURN TRANSCRIPT OR Or (2) Submitting a 2017 SIGNED 1040/1040A/1040EZ. Request a TAX TRANSCRIPT from www.irs.gov. - Select "Get Your Tax Record" and then "Get a Transcript (Online or by Mail)." Request a *Return Transcript* **NOT** an *Account Transcript*. This option takes 5-10 business days, and must be mailed to your address and **NOT** directly to ETBU.
3. Submit the completed form and supporting documents to the ETBU financial aid office.

Office Use Only

Date: _____ Received By: _____ Processed By: _____ Code: VERIFICATION

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Non-Tax Filers – both student and/or spouse:

- Complete this section if you did not and were not required to file a 2017 income tax return with the IRS. Please check if you were not employed and had no income earned from work in 2017.
 - Student
 - Spouse
- Request the 2017 Tax Return Transcript at www.irs.gov select “Get Your Tax Record” and then “Get a Transcript (Online or by Mail).” Request a *Return Transcript* **NOT** an *Account Transcript*. This option takes 5-10 business to be mailed to you. If you are unable to obtain a tax transcript or Verification of Non-filing Letter from the IRS you can submit a signed statement indicating you tried to get a these documents but were not able and a statement that you did not file.
- Complete this section if the student and/or spouse were employed in 2017 and were not required to file a 2017 income tax return and attach a copy of the **2017 IRS W-2** from each employer.

Student:	Employer’s Name	2017 Amount Earned

Spouse:	Employer’s Name	2017 Amount Earned

C. Additional Information

SNAP (Food Stamps)

You or your spouse received SNAP (food stamp) benefits in 2016 or 2017 and will provide documentation of the receipt of SNAP benefits during 2016 and/or 2017.

Child Support Paid

Complete the section below if you or your spouse paid child support in 2017.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support was Paid	Age of Child for Whom Support was Paid	Amount of Child Support Paid in 2017

Other Untaxed Income (IRA distributions/deductions/payments, pensions, child support received, clergy allowances, veterans non-education benefits)

Source: _____ Amount: _____

D. Certification and Signatures

By signing this worksheet I (we) certify that all of the information reported on it is complete and correct. I understand that purposely giving false or misleading information on this worksheet can result in a fine, jail sentence, or both.

Student’s Signature

Date

Return this form and any attachments to:

Office of Financial Aid – East Texas Baptist University | One Tiger Drive, Marshall, TX 75670 | Phone: 903-923-2138

Email: financialaid@etbu.edu | Fax: 903-934-8120

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