



# 2020-2021 Dependent Verification Worksheet Tracking Group (V5)-Aggregate

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that, before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

## A. Dependent Student's Information

Last Name	First Name	M.I.	Last 4 Digits of SSN
Address	City	State	Zip Code
ASU ID Number	Email Address	Home or Cell Phone Number	

## B. Dependent Student's Family Information

List below the people in your parent(s)' household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2020, through June 30, 2021, or if the other children would be required to provide parental information if they were completing a FAFSA for 2020-2021. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2020, and June 30, 2021. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

Full Name	Age	Relationship	College	Will Be Enrolled at Least Half Time
		Self		

## C. Verification of 2018 Income Information for Parent Tax Filers

**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.

**Instructions:** Complete this section if the parents filed or will file a 2018 IRS income tax return(s). *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 [FAFSA.gov](http://FAFSA.gov).* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if

Student's Name: \_\_\_\_\_ Last 4 Digits of Student's SSN: \_\_\_\_\_

that information was not changed.

**Check the box that applies:**

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA once the 2018 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2018 IRS Tax Return Transcript(s)**. If the parents filed separate 2018 IRS income tax returns, **2018 IRS Tax Return Transcripts** must be provided for each. **Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.**
  - Check here if a **2018 IRS Tax Return Transcript(s)** is provided.
  - Check here if a **2018 IRS Tax Return Transcript(s)** will be provided later.

A **2018 IRS Tax Return Transcript** may be obtained through the:

- Online Request - Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." 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 - IRS Form 4506T-EZ or IRS Form 4506-T

## D. Verification of 2018 Income Information for Parent Nontax Filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2018 income tax return with the IRS. **Check the box that applies:**

- Neither parent was employed, and neither had income earned from work in 2018.
- One or both parents were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018 and whether an IRS W-2 form is provided. [Provide copies of all 2018 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

**If more space is needed, provide a separate page with the student's name and ID number at the top. Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS.**

Employer's Name	2018 Amount Earned	IRS W-2 Attached?

## E. Verification of 2018 Income Information for Student Tax Filers

**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.

**Instructions:** Complete this section if the student and spouse filed or will file a 2018 IRS income tax return(s). *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 [FAFSA.gov](http://FAFSA.gov).* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

Student's Name: \_\_\_\_\_ Last 4 Digits of Student's SSN: \_\_\_\_\_

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA once the 2018 IRS income tax return has been filed.

The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2018 IRS Tax Return Transcript(s)**. If the student and spouse filed separate 2018 IRS income tax returns, **2018 IRS Tax Return Transcripts** must be provided for each.

- Check here if a **2018 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2018 IRS Tax Return Transcript(s)** will be provided later.

A **2018 IRS Tax Return Transcript** may be obtained through the:

- Online Request - Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." 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 - IRS Form 4506T-EZ or IRS Form 4506-T

## F. Verification of 2018 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2018 income tax return with the IRS. **Check the box that applies:**

- The student and spouse were not employed and had no income earned from work in 2018.
- The student and/or spouse were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form is provided. [Provide copies of all 2018 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

**If more space is needed, provide a separate page with the student's name and ID number at the top. Note: We may require you to provide documentation from the IRS that indicates a 2018 IRS income tax return was not filed with the IRS.**

Employer's Name	2018 Amount Earned	IRS W-2 Attached?

## G. Verification of 2018 Income Information for Individuals with Unusual Circumstances

### Individuals Granted a Filing Extension by the IRS

An individual is required to file a 2018 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- 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 2018;
- 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 2018;
- Verification of Non-filing letter (confirmation that the tax return has not yet been filed) from IRS or other relevant tax authority dated on or after October 1, 2018;
- A copy of IRS Form W-2 for each source of employment income received for tax year 2018 and, 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 2018.

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

**Student's Name:** \_\_\_\_\_ **Last 4 Digits of Student's SSN:** \_\_\_\_\_

An individual filed an amended IRS income tax return for tax year 2018, must provide both of the following:

- A 2018 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

### **Individuals Who Were Victims of Tax Administration Identity Theft**

- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and** a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related theft and that the IRS is aware of the tax-related identity theft.

### **Individuals Who Filed Non-IRS Income Tax Returns**

- An individual filed or will file a 2018 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 2018 income tax return(s); **or**
  - A tax filer who filed an income tax return with the tax authority from American Samoa must provide a copy of his or her tax account information
  - A transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for tax year 2018.

## **J. High School Completion Status**

Provide one of the following documents that will indicate your high school completion status when you begin college in 2020–2021

- A copy of your high school diploma.
- A copy of your final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript you received after you passed a State-authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma.
- If you completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- An academic transcript that indicates you successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If you were homeschooled in a state where state law requires you to obtain a secondary school completion credential for home-school (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If you were homeschooled in a state where state law does not require you to obtain a secondary school completion credential for home-school (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by your parent or guardian, that lists the secondary school courses you completed and includes a statement that you successfully completed a secondary school education in a home-school setting.

**Contact the financial aid office if you are unable to obtain the documentation listed above.**

## **K. Identity and Statement of Educational Purpose (To Be Signed in the Presence of a Notary)**

If you are able to appear in person at Alcorn State University (Name of Postsecondary Educational Institution) to verify your identity, you must provide:

- (a) **A copy of the unexpired-valid government-issued photo identification (ID) that is acknowledged in the notary statement below or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport. Alcorn State University will maintain a copy of the student's photo ID that is annotated by the**
- (b) **institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.**

If you are unable to appear in person at Alcorn State University (Name of Postsecondary Educational Institution) to verify your identity, you must provide:

Student's Name: \_\_\_\_\_ Last 4 Digits of Student's SSN: \_\_\_\_\_

(c) A copy of the unexpired-valid government-issued photo identification (ID) that is acknowledged in the notary statement below or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and

(d) The original Statement of Educational Purpose, which is provided below, must be notarized.

### Statement of Educational Purpose

I certify that I, \_\_\_\_\_ (Print Student's Name) am the individual signing this statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending \_\_\_\_\_ (Name of Postsecondary Educational Institution) for 2020-2021.

\_\_\_\_\_  
Student Signature Date ASU ID Number

### Notary's Certificate of Acknowledgement

State of \_\_\_\_\_ City/County of \_\_\_\_\_

On \_\_\_\_\_ (Date), before me, \_\_\_\_\_, (Notary's name) personally appeared \_\_\_\_\_ (Printed name of signer) and proved to me on basis of satisfactory evidence of identification \_\_\_\_\_ (Type of government-issued photo ID provided) to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

(seal)

\_\_\_\_\_ (Notary signature)

My commission expires on \_\_\_\_\_ (Date)

### L Certification and Signature

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

\_\_\_\_\_  
Student's Signature Date

\_\_\_\_\_  
Parent's Signature Date

\_\_\_\_\_  
ASU Financial Aid Staff Member's Signature Date  
(ONLY IF WITNESSING IN-PERSON SIGNATURES OF STUDENT AND PARENT)

\_\_\_\_\_  
ASU Financial Aid Staff Member's Name & Title  
(IF SIGNED ABOVE, MUST ALSO COPY ORIGINAL ID'S)

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

**Return Form to:**  
**Alcorn State University**  
**Office of Student Financial Aid**  
**1000 ASU Drive, 28**  
**Alcorn State, MS 39096-7500**  
**Fax: (601) 877-6110**  
**Email: [asufinaid@alcorn.edu](mailto:asufinaid@alcorn.edu)**