

2021-2022 Verification Worksheet

WEST TEXAS A&M UNIVERSITY
FINANCIAL AID

WTAMU Box 60939, Canyon, TX 79016

Phone: 806-651-2055 FAX: 806-651-2924 Email: financial@wtamu.edu

Before your financial aid for the 2021-2022 school year can be completed, federal regulations require that your FAFSA information be verified for accuracy. We will compare your FAFSA with the information on this worksheet and copies of your (and spouse's or parents') **2019 W2s, 1040 Schedule 1, C, E and F (if part of the tax return)** and any other required documents, including those listed on the student portal. If there are differences, your FAFSA award may be different from the estimate. We may ask for additional information. Complete this form as soon as possible to get financial aid promptly.

A. Student's Information

Student's Last Name Student's First Name Student's M.I. Student's Buff ID Number

Student's Phone Number (include area code) Student's Alternate or Home Phone Number

Follow the instructions for the chart below, based on your status as determined on the FAFSA:

■ **DEPENDENT** – List below the people in your parents' household even if you do not live with your parents, and include:

- yourself **and** your parent(s) (including stepparent), list both parents if they live together, whether married or not
- **and** your parents' other children even if they do not live with your parents, if they are under 24 years of age and either (a) your parents will provide more than half of their support from July 1, 2021 through June 30, 2022, or (b) the children would be required to provide parental information if they were completing a 2021-2022 FAFSA.
- **and** other people if they now live with your parents, and your parents provide more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2022.

■ **INDEPENDENT** - List below the people in your (the student's) household, and include:

- yourself, **and** your spouse if currently married,
- **and** your or your spouse's children, if you or your spouse will provide more than half of the children's support from July 1, 2021 through June 30, 2022 even if a child does not live with you,
- **and** other people if they now live with you, and if you or your spouse currently provide more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2022.

Per instructions above, list the names of **ALL** eligible household members and their date of birth, age and relationship to you. **If you need more space, attach a separate page with the student's name and Buff ID number at the top.**

Full Name	Date of birth	Age	Relationship to student	Will this person be enrolled at least half-time in a degree, diploma or certificate program? (Yes/No)
			Self	

With few exceptions, state law gives you the right to request, receive, review and correct information about yourself collected on this form. All signatures must be actual signatures, not computer-generated.

_____ Student signature

_____ Parent signature

Student's Name: _____ Buff ID # _____

B. Student's Income Information

- Check here if, in 2019, you the student (and your spouse if you are currently married) earned **NO income** of any kind and did not file taxes and were not required to file taxes.
 - **Students who are determined "Independent" by FAFSA who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2020 that confirms a 2019 income tax return was not filed by the student. A Non-Filing Tax Transcript is also needed for a student's spouse who did not file 2019 taxes. Instructions on how to obtain a Non-Filing Tax Transcript are on the last page of this worksheet. Our office may require additional documentation.**

If **ANY** income was earned in 2019 by you the student (or by your spouse if you are currently married), fill out the chart below and check **ONE** of the two boxes below:

- You (and your spouse if currently married) earned income in 2019 and did NOT file a 2019 income tax return, will not file taxes, and were not required to file taxes. List in the chart below **ALL** sources of income, amount earned and type of income. Provide copies of all 2019 IRS W-2 forms or equivalent documents for student (and spouse if currently married).
 - **Students who are determined "Independent" by FAFSA who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2020 that confirms a 2019 income tax return was not filed by the student. A Non-Filing Tax Transcript is also needed for a student's spouse who did not file 2019 taxes. Instructions on how to obtain a Non-Filing Tax Transcript are on the last page of this worksheet. Our office may require additional documentation.**
- You (or your spouse if currently married) filed or will file a 2019 income tax return. List in the chart below **ALL** sources of income, amount earned and type of income. Provide copies of all 2019 IRS W-2 forms or equivalent documents for student (and spouse if currently married). If you were unable to successfully link with the IRS Data Retrieval Tool (DRT) on the FAFSA, you must provide us 2019 IRS Tax Return Transcript(s). If student and spouse filed separate 2019 IRS income tax returns, linking will not work and therefore a 2019 IRS Tax Return Transcript must be provided for each person. *Instructions for obtaining a Tax Return Transcript are on the last page of this worksheet.*

❖ Whether or not you linked, list in the box below **all 2019 income** earned by you (and your spouse if you are currently married) including W2 income, self-employment income, farm income, and/or income reported on Schedule E on the tax return. Notify our office if you had a change in marital status after December 31, 2019.

Employer's Name	2019 Amount Earned	Is this IRS W2 Income?	Self-Employment Income?	Farm Income?	Rental Prop or Partnership Income?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$1500.00(example)</i>		<i>Yes(example)</i>		

You MUST also submit the following documents for each of these types of income:

- ALL W2s and 1099s for income earned from work (can substitute 2019 Wage and Income Transcript obtained from the IRS)
- Schedule C for Self-Employment income or loss
- Schedule E for Rental Real Estate, Royalties, Partnerships, S Corps, Estates, Trusts, etc.
- Schedule F for Farm income or loss

_____ Student signature _____ Parent signature

Student's Name: _____ Buff ID # _____

C. Dependent Student Parent's Income Information (for each parent/stepparent included in the household). On this form, the word "parent" or "parents" also refers to a stepparent that is included in the household.

- Check here if, in 2019, the parents earned **NO income** of any kind and did not file taxes and were not required to file taxes.
 - **A parent who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2020 that confirms a 2019 income tax return was not filed. You must provide Non-Filing Tax Transcripts that include the social security number of each parent in the household who did not file 2019 taxes. Instructions on how to obtain a Non-Filing Tax Transcript are on the last page of this worksheet. Our office may require additional documentation.**

If **ANY** income was earned in 2019 by one or both parents, fill out the chart below and check **ONE** of the two boxes below:

- One or both parents earned income in 2019 and both parents did NOT file a 2019 income tax return, will not file taxes, and were not required to file taxes. List in the chart below **ALL** sources of income, amount earned and type of income. Provide copies of all 2019 IRS W-2 forms or equivalent documents.
 - **A parent who did not file taxes must provide an IRS Non-Filing Tax Transcript dated on or after October 1, 2020 that confirms a 2019 income tax return was not filed. You must provide Non-Filing Tax Transcripts that include the social security numbers of each parent in the household who did not file 2019 taxes. Instructions on how to obtain a Non-Filing Tax Transcript are on the last page of this worksheet. Our office may require additional documentation.**

- One or both parents filed or will file a 2019 income tax return. List in the chart below **ALL** sources of income, amount earned and type of income. Provide copies of all 2019 IRS W-2 forms or equivalent documents. If you were unable to successfully link with the IRS Data Retrieval Tool (DRT) on the FAFSA, you must provide us their 2019 IRS Tax Return Transcript. If they filed separate 2019 IRS income tax returns, linking will not work and therefore a 2019 IRS Tax Return Transcript or Non-Filing Tax Transcript must be provided for each person. *Instructions for obtaining a Tax Return Transcript are on the last page of this worksheet.*

❖ Whether or not you linked, list in the box below **all 2019 income** earned by both parents in the household to include W2 income, self-employment income, farm income, and/or income reported on Schedule E on the tax return. Notify our office if your parent had a change in marital status after December 31, 2019.

Employer's Name	2019 Amount Earned	Is this IRS W2 Income?	Self-Employment Income?	Farm Income?	Rental Prop or Partnership Income?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$1500.00(example)</i>		<i>Yes(example)</i>		

You MUST also submit the following documents for each of these types of income:

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- Schedule C for Self-Employment income or loss
- Schedule E for Rental Real Estate, Royalties, Partnerships, S Corps, Estates, Trusts, etc.
- Schedule F for Farm income or loss

_____ Student signature _____ Parent signature

Student's Name: _____ Buff ID # _____

Basic steps for using the IRS Data Retrieval Tool (IRS DRT)

- ❖ www.fafsa.gov
 - Log in to your 21/22 FAFSA record
 - Make FAFSA corrections
 - Navigate to financial information section, follow instructions to determine if eligible to use IRS DRT
 - If eligible, transfer 2019 IRS income tax information into your FAFSA

A **2019 IRS Tax Return Transcript** may be obtained through:

- ❖ Get Transcript by MAIL – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript by MAIL.” Make sure to request the “Return Transcript” and **NOT** the “Account Transcript.” Generally, you can expect to receive your transcript within 10 business days from the IRS’s receipt of the online request.
- ❖ Get Transcript ONLINE – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Make sure to request the “Return Transcript” and **NOT** the “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. Generally, you can expect to receive your transcript 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. Generally, you can expect to receive your transcript within 10 business days from the IRS’s receipt of the paper request form.

A **2019 IRS Non-Filing Tax Transcript** may be obtained through:

- ❖ Get Transcript by Mail - Download form 4506-T from www.irs.gov, mail or fax the completed form to the appropriate address (or fax number) at the IRS. **Make sure to check box 7 for ‘Verification of Non-filing’** After the IRS processes the signed request, the Non-Filing letter will be mailed within 5 to 10 business days.
- ❖ Get Transcript ONLINE – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Select *Verification of Non-Filing*. 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.

Have the IRS send tax return transcripts to you or your parents, **NOT** to WTAMU Financial Aid. Then you or your parents will submit copies to WTAMU Financial Aid with your name and Buff ID number on each page of the report, along with a notation of whether the report is for student, spouse, or parent. Please number each page.

D. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. The student and (if student is dependent) one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

***Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to WTAMU Financial Aid.***

You should make a copy of this worksheet and supporting documents for your records.

SIGNATURES ARE REQUIRED!

_____ Date of signature

_____ Date of signature

_____ Student signature

_____ Parent signature