

Troy University  
 Financial Aid Office  
 134 Adams Administration Bldg.  
 Troy, AL 36082

**Dependent  
 Verification Worksheet (V1)  
 2020-2021**  
**Call 1-800-414-5756 for questions**



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 provide 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 must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid office at Troy University. The financial aid office may ask for additional information. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed. You must return this form to the address listed on this form.

**A. Student Information**

Student's Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
First M.I. Last

Date of Birth: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Address: \_\_\_\_\_  
Street/P.O. Box City State Zip

**B. Family Information**

List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents 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 the children do not live with the parents.
- Other people if they now live with the parents and the 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, 2021.

For any household member, excluding the parents, 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, 2020, and June 30, 2021, include the name of the college. If more space is needed, provide a separate page with the student's name and social security number at the top.

Full Name	Age	Relationship	College
<b>You, the student</b>			<b>Troy University</b>

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.

Student's Name \_\_\_\_\_ SSN: \_\_\_\_\_

**C. Verification of 2018 IRS Income Tax Return Information for Student Tax Filers**

**Instructions:** Complete this section if the student 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.* In most cases, no further documentation is needed to verify 2018 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

**Check the box that applies:**

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.

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) or a signed copy of the 2018 income tax return. Must include W-2 Forms and applicable schedules.**

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

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

\_\_\_ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 tax return, W-2 Forms and applicable schedules** is provided.

\_\_\_ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 tax return, W-2 Forms and applicable schedules** will be provided later.

**Verification of 2018 Income Information for Student Nontax Filers**

Complete this section if the student will not file and is not required to file a 2018 income tax return with the IRS.

**Check the box that applies:**

The student was not employed and had no income earned from work in 2018.

The student was employed in 2018 and has 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 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 social security number at the top.

Employer's Name	2018 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.

\_\_\_ Check here if confirmation of nonfiling is provided. \_\_\_ Check here if confirmation of nonfiling will be provided later.

Student's Name \_\_\_\_\_ SSN: \_\_\_\_\_

**D. Verification of 2018 IRS Income Tax Return 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 the end of the 2018 tax year on 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 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

**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) or a signed copy of the 2018 income tax return. Must include W-2 Forms and applicable schedules.**

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

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

If the parents filed separate 2018 IRS income tax returns, **2018 IRS Tax Return Transcripts or a signed copy of the 2018 income tax return and applicable schedules must be provided for each.**

\_\_\_\_ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 tax return, W-2 Forms and applicable schedules** is provided.

\_\_\_\_ Check here if a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 tax return, W-2 Forms and applicable schedules** will be provided later.

**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. You must complete a 2020-2021 Living Expense Statement form. It can be located at <http://trojan.troy.edu/financialaid> under **2020-2021 Forms**.

**Check the box that applies:**

One parent was not employed and had no income earned from work in 2018.

Neither parent was employed and had no 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 social security number at the top.

Employer's Name	2018 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.

\_\_\_\_ Check here if confirmation of nonfiling is provided.

\_\_\_\_ Check here if confirmation of nonfiling will be provided later.

Student's Name \_\_\_\_\_ SSN: \_\_\_\_\_

**Instructions:** Please complete all the fields below. If any field is left blank, we will consider the form incomplete, we will **NOT** assume 0.

STUDENT	2018 Additional Financial Information	PARENT(S)
	Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3-line 50.	
	Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children you claimed in household size.	
	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	
	Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	
	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	
	Cooperative education program earnings.	

STUDENT	2018 Untaxed Income	PARENT(S)
	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes, D, E, F, G, H, and S.	
	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1-total of lines 28+32.	
	Child support received for all children. Don't include foster care or adoption fees.	
	Tax exempt interest income from IRS Form 1040-line 2a.	
	Untaxed portions of IRA distributions and pensions from IRS Form 1040-line 4a minus line 4b. Exclude rollovers. If negative, enter a zero here.	
	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits) Don't include the value of on-base military housing or the value of a basic military allowance for housing.	
	Veterans' non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.	
	Other untaxed income not reported, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS form 1040 Schedule 1- line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending plans (e.g. cafeteria plan), foreign income exclusion or credit for fed tax on special fuels.	
	Money received, or paid on your behalf (e.g. bills) not reported elsewhere on form.	

Student's Name \_\_\_\_\_ SSN: \_\_\_\_\_

**F. Certification and Signature**

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**Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:**

You must complete the FAFSA IRS Data Retrieval or submit a copy of your 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return. Must include W-2(s), and applicable schedules when you file your IRS income tax return for verification to be considered complete.

Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

An individual who filed an amended IRS income tax return for tax year 2018 must provide a signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return;
- 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; or
- A signed copy of the 2018 IRS Form 1040 and the applicable schedules that were filed with the IRS.

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

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

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date