

2020-2021 Verification Worksheet

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 if dependent, 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. Student Information

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>SouthArk Student ID Number</i>
<i>Address (include apt. #)</i>		<i>City</i>	<i>State</i>
<i>Date of Birth</i>	<i>E-mail Address</i>	<i>Phone Number (include area code)</i>	

B. Family Information (Please check the appropriate box)

Per your **2020-2021** FAFSA information, were you:

Independent

Dependent

List ALL household members. Include: the student, spouse (if married); Dependents should list parent(s)-including any stepparent if applicable; Student's, spouse's & parents' other children and any other individual that will receive more than half of their support from 7-1-20 to 6-30-21 (or if they would be classified as dependent on the 20-21 FAFSA; and any other household member(s). Also write in the name of the college for any family member, **excluding** your parent(s), who will be enrolled at least half-time in a degree, diploma, or certificate program at an eligible postsecondary educational institution between July 1, 2020 and June 30, 2021. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be enrolled at Least Half-Time (Yes or No)
<i>Example: Martha Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>	
		Self		

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.

C. Tax Forms and Income Information

1. Verification of 2018 IRS Income Tax Return Information for Student and/or Parent Tax Filers.

Important Note: The instructions below apply to the student and spouse, if the student is married; or parent, if the student is dependent. Notify the financial aid office if the student (spouse) or married parents filed separate IRS income tax returns for 2018 or had a change in marital status after the end of 2018 tax year on December 31, 2018.

Instructions: Complete this section if the student and spouse (or married 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. In most cases, no further documentation is needed to verify 2018 IRS income tax information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. In most cases, for electronic filers, 2018 IRS income tax return information for the IRS DRT is available within 2-3 weeks after the 2018 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2018 paper IRS income tax return, the 2018 IRS income tax return information is available for the IRS DRT within 8-11 weeks after the 2018 paper IRS income tax return have been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

Check all that apply:

- The **student** has used the IRS Data Retrieval Tool (DRT) to transfer 2018 IRS income return information.
- The **student** has not yet used the IRS DRT but will use the tool to transfer 2018 IRS income tax information into the students FAFSA.
- The **student** is unable or chooses not to use the IRS DRT & instead will provide a 2018 Tax Return Transcript(s) or a **SIGNED** copy of the 2018 income tax return and applicable schedules.
- The **parents** have used the IRS Data Retrieval Tool (DRT) to transfer 2018 IRS income return information.
- The **parents** have not yet used the IRS DRT but will use tool to transfer 2018 IRS income tax information into the students FAFSA.
- The **parents** are unable or chooses not to use the IRS DRT & instead will provide a 2018 Tax Return Transcript(s) or a **SIGNED** copy of the 2018 income tax return and applicable schedules.

To obtain a **2018 IRS Tax Return Transcript** you may 1) go to www.irs.gov and click on the "Get Your Tax Record" link, Click "Get transcript by Mail" or 2) Call 1-800-908-9946 and make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript", or 3) go online to www.irs.gov, click "Get Your Tax Record", Click "Get Transcript Online" create an account, and follow the prompts. Use the Social Security Number and date of birth of the first person listed on the 2018 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2018 IRS income tax return), or 4) use the IRS Form 4506-T or 4506T-EZ to mail in your request. In most cases, for electronic filers, a **2018 IRS Tax Return Transcript** may be requested from the IRS within 2-3 weeks after the 2018 IRS income tax return has been accepted by the IRS. Generally, for filers of 2018 paper IRS income tax returns, the **2018 IRS Tax Return Transcript** may be requested with 8-11 weeks after the 2018 paper IRS income tax return id received by the IRS.

- If the student and spouse (or married parents) filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 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 income tax return and applicable schedules is provided.
 - _____ Check here if a **2018 IRS Tax Return Transcript(s)** or a **SIGNED** copy of the 2018 income tax return and applicable schedules will be provided later. (*this may delay awarding*)

2. Verification of 2018 Income Information for Student and/or Parent Non-tax Filers

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

Check all that apply:

- The student and/or spouse were not employed and had no income earned from work in 2018.
- Neither parent was employed and neither had income earned from work in 2018.
- The student, spouse, and/or parent were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether and IRS W-2 is provided.
[Provide copies of all 2018 IRS W-2 forms issued to the student, spouse (if married) and/or parent by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Employer’s Name	Student Amount Earned From Work	Spouse or Parent(s) Amount Earned From Work	IRS W-2 or an Equivalent Document Provided?

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. (See IRS Documentation Form for instructions)

- ____ Check here if confirmation of non-filing is provided.
- ____ Check here if confirmation of non-filing will be provided later. (*this may delay awarding*)

Verification of 2018 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Tax Return

Must provide the following:

- A **signed** copy of the 2018 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with IRS; AND
- A **2018 Tax Return** Transcript (that will only include information from the original tax return); or
- a **signed** copy of the 2018 income tax return and applicable schedules; or
- IRS DRT information on an ISIR record with all tax information from the original tax return. (DRT Flags 02 or 07)

Verification of 2018 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2018 **IRS Tax Return Transcript** or use the IRS DRT must provide a Tax Return DataBase View (TDRBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2018 income tax return and applicable schedules the individual filed with the IRS; **AND** a statement signed and dated by the tax filer indicating that he or she was victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft.

D. Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct.

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

Printed Student’s Name Date

Parent’s Signature (Dependent Students Only) Date

Student’s Signature (Required) Date

Spouse’s Signature (Optional) Date