

Student Name:

UID:U00

D. Federal Work-Study Earnings for 2017

Did **Student** earn any money from Federal Work-Study in 2017? No Yes

If Yes, answer these questions:

Amount of Federal Work-Study **student** earned in 2017: \$ _____

Name of school where Work-Study was earned in 2017: _____

E. Tax Filing Information for 2017

Student 2017 Taxes	STUDENT MUST SELECT FROM THE 2 OPTIONS BELOW	
	<p>1. <input type="checkbox"/> Student filed a tax return for 2017. Attach Tax Return Transcript or use IRS Data Retrieval Tool.</p> <p>2. <input type="checkbox"/> Student did not file a 2017 tax return and was not required to file WORKED or DID NOT WORK</p> <p><u>Add employer(s) only if no tax return was filed and student worked in 2017</u></p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p>	

W-2s attached
(Required if no tax return filed)

Parent(s) 2017 Taxes	PARENT(S) MUST SELECT FROM THE 4 OPTIONS BELOW	
	<p>Attach 2017 Tax Return Transcript(s) or use the IRS Data Retrieval Tool for each tax return filed. Attach 2017 IRS Non-Filing Transcript for each Parent who <i>did not file a tax return</i>.</p> <p>1. <input type="checkbox"/> Parent 1 and Parent 2 filed a joint tax return for 2017</p> <p>2. <input type="checkbox"/> Parent 1 filed a tax return for 2017 and there is no other parent in the household</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Note: If options 1 and 2 (above) do not apply, select appropriate boxes below. If one parent did not file a tax return and the other parent did file a tax return, check the appropriate boxes in options 3 and 4.</p> </div> <p>3. Parent(s) filed a separate tax return for 2017 and two parents are in the household</p> <p><input type="checkbox"/> Parent 1 filed a separate tax return for 2017</p> <p><input type="checkbox"/> Parent 2 filed a separate tax return for 2017</p> <p>4. Parent(s) did not file a tax return for 2017</p> <p><input type="checkbox"/> Parent 1 did not file a tax return and was not required to file <input type="checkbox"/> WORKED or <input type="checkbox"/> DID NOT WORK</p> <p><input type="checkbox"/> Parent 2 did not file a tax return and was not required to file <input type="checkbox"/> WORKED or <input type="checkbox"/> DID NOT WORK</p> <p><u>Add employer(s) ONLY IF no tax return was filed and parent(s) worked in 2017</u></p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p> <p>Employer _____ Amount earned \$ _____</p>	

W-2s attached
(Required if no tax return filed)

F. IRA and Pension or Annuity Distributions on Student's and/or Parent(s)' 2017 Tax Returns

Student	Parent 1 (Or both Parents if taxes filed jointly)	Parent 2 (Only if taxes filed separately)
<input type="checkbox"/> No IRA or Pension Rollover(s)	<input type="checkbox"/> No IRA or Pension Rollover(s)	<input type="checkbox"/> No IRA or Pension Rollover(s)
<input type="checkbox"/> Yes, IRA Rollover \$ _____	<input type="checkbox"/> Yes, IRA Rollover \$ _____	<input type="checkbox"/> Yes, IRA Rollover \$ _____
<input type="checkbox"/> Yes, Pension Rollover \$ _____	<input type="checkbox"/> Yes, Pension Rollover \$ _____	<input type="checkbox"/> Yes, Pension Rollover \$ _____

2019-2020

Dependent Verification Guide

TIPS FOR COMPLETING THE VERIFICATION FORM

Verification is the process required by the U.S. Department of Education to confirm that information reported on the FAFSA is accurate. The U.S. Department of Education often selects students randomly for this process. The Office of Financial Aid begins verifying FAFSA information after receiving all requested forms and documentation.

See *Verification Worksheet* for the corresponding sections for B, E, and F below.

B. Legal parent(s) for the FAFSA as defined by the U.S. Department of Education

Legal parent for the FAFSA includes biological parent(s), stepparent, and adoptive parents
For the FAFSA, grandparents, foster parents, legal guardians, legal custodians, brothers, sisters, aunts, uncles, and widowed stepparents are not legal parents unless they have legally adopted the student.

Marital Status of student's parent(s)	Information required by the U.S. Department of Education
Married	Both parents or legal adoptive parents
Unmarried, but biological parents live together	Both biological parents
Remarried <i>after divorce or widowing</i>	Legal parent and stepparent
Divorced or Separated	<p>Legal parent – <i>the parent whom the student lived with the most during the 12 months prior to completing the FAFSA</i></p> <p>Students who lived equally with both parents need to provide information about the legal parent who provided the most financial support for the 12 months prior to completing the FAFSA.</p> <p>Students who do not live with a parent need to provide parent information for the parent who provided the most support the last time they lived with a parent.</p>
Widowed	Legal parent only (unless remarried)
Never married <i>to anyone</i>	<p>Legal parent – <i>if they did not marry the other biological parent or anyone else</i></p> <p>If parent has ever married, the “never married” status does not apply. The marital status for the parent would be: married, remarried, widowed, divorced, or separated.</p>

B. Other Household Members INCLUDE:

Parent(s)' other children (even if they do not live with them) – who will receive more than half their support from the student's parent(s) from July 1, 2019 - June 30, 2020. *(But not if child support is paid for them.)*

NOTE: The FAFSA does not have the same dependency rules as the IRS. Contact Raider Connect for help.

Parent(s)' adult children who are not yet 24, not married, not a veteran, not active duty military, who do not live with the parent(s); but they would be required to put parent(s) on the FAFSA if they also attend college.

Other people, **ONLY IF** they live with student's parent(s) now **AND** receive more than half their support from student's parent(s) **AND** will continue to receive half support from student's parent(s) from 7/1/19 - 6/30/20.

Does **not** include foster children for whom student's parent(s) receive a subsidy.

Does **not** include children whom student's parent(s) included in *child support paid* figure on the FAFSA.

Support includes: *housing, utilities, cell service, transportation, food, clothing, medical, childcare, personal*

E. FAFSA requirements for Student and/or Parent(s) *who filed* a 2017 tax return

Provide official tax information → **TWO OPTIONS:**

- 1.) Use the ****IRS Data Retrieval Tool (DRT)** on the FAFSA to transfer tax information
- 2.) Obtain the ***IRS Tax Return Transcript** for 2017 and submit a copy to Raider Connect

Student and/or Parent(s) with an AMENDED TAX RETURN for tax year 2017

AMENDED TAX RETURN IS WHEN A TAXPAYER FILES IRS FORM 1040X OR WHEN THE IRS MAKES A CORRECTION TO A TAX RETURN

Additional tax documentation required *ONLY IF* there is an **AMENDED TAX RETURN** → **TWO OPTIONS:**

- 1.) Submit a **signed and dated** copy of the 1040X filed with the IRS for tax year 2017
- 2.) Obtain the ***IRS Tax Account Transcript** for 2017 and submit a copy to the Office of Financial Aid

E. FAFSA requirements for Student and/or Parent(s) *who did not file* a 2017 Tax Return

Dependent students **do not need to obtain** a Non-Filing Letter from the IRS if no tax return filed for 2017

Parent(s) **must obtain** a ***Non-Filing Letter** from the IRS if no tax return filed for 2017

Student and/or Parent(s) who earned money from work in 2017 but did not file a tax return

SOMETIMES PEOPLE EARN MONEY BUT DO NOT MAKE ENOUGH TO BE REQUIRED TO FILE A TAX RETURN

For earnings from work → **TWO STEPS:**

- 1.) Must provide copies of all W-2s for 2017 (or the IRS Wage & Income Transcript)
- 2.) On the Verification Worksheet, list names of all employers and amounts earned for 2017

F. IRA and Pension or Annuity Distributions on Student's and/or Parent(s)' Tax Returns

Untaxed IRA Distributions	1040 (line 15a minus line 15b) 1040A (line 11a minus line 11b)
Untaxed Pensions and Annuities	1040 (line 16a minus line 16b) 1040A (line 12a minus line 12b)

If student's or parent(s)' tax return shows a ROLLOVER for all or part of the untaxed amount (calculated above), check box on the Verification Worksheet for the correct type of rollover and write in the rollover amount.

RESOURCES

*IRS Tax Transcripts / Verification of Non-Filing	Order the Tax Return Transcript, Tax Account Transcript, IRS Verification of Non-Filing, and Wage and Income Transcript for W-2s https://www.irs.gov/individuals/get-transcript
**IRS Data Retrieval Tool (DRT)	To use the IRS Data Retrieval Tool at a later time, login to the FAFSA and select MAKE A FAFSA CORRECTION . Navigate to the student and/or parent financial section(s). Upon being successful with transferring the tax information into the FAFSA, sign it with FSA ID(s) and SUBMIT .
Wings Express	Track verification status on student's WINGS Express. Student will be contacted if more information is needed.

For deadline and processing timeframes, see <https://www.wright.edu/raiderconnect/financial-aid/important-dates>