



## 2020-2021 Dependent Verification Worksheet

Required by the U.S Department of Education

**Raider Connect**  
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# D

### A. Student Information

		<b>University ID (UID) – Required.</b>
Last Name _____	First Name M.I. _____	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <span style="font-size: 24px; font-weight: bold;">U</span> </div>
Student Cell Phone Number _____	Parent Phone Number _____	
Age: _____	Last 4 of SSN: _____	<i>For assistance retrieving your UID Contact the Help Desk: (937) 775-4827 or 1-888-775-4827</i>

### B. Parent(s) Household Information

List below: Name(s) of parent(s) on the FAFSA living in the household. (If parent is remarried, include stepparent.)  
*Do not include a parent who does not live in the household due to separation or divorce.*

	First and Last Name (Parent(s)/Stepparent)	Age	Last 4 of SSN	Relationship to Student (Indicate Parent/Stepparent)
Parent 1			xxx-xx-	
Parent 2			xxx-xx-	

List below:

- Children of the above listed parent(s) for whom student's parent(s) will provide *more than half* their support from July 1, 2020 - June 30, 2021, even if they do not live with your parents. Exclude child if parent pays child support for them.
- Other people who are **not** your parents' children, **ONLY IF** they live with your parent(s) now **AND** your parent(s) provide more than half their support **AND** will continue to provide more than half support from July 1, 2020 - June 30, 2021.

First and Last Name (Other Household Members)	Age	Relationship to Student	College name – if attending at least ½ time during 7/1/20-6/30/21	State – where college is located

\*\*If more space is needed, please attach a separate page.

### C. Certification

We certify that all information entered is complete and correct. (*Handwritten Signatures Required. Form may be emailed or faxed.*)

/ /
/ /

**Student Signature**
**Date**
**Parent Signature (one required)**
**Date**

For Office Use Only (VRDEPO - Dep Ver Worksheet)						Date Stamp
Parent 1	Parent 2	Student	Submit to Review:	ROAUSDF Review:	Complete:	
<input type="checkbox"/> 18TPAR <input type="checkbox"/> 18WPAR <small>(non-filer)</small>	<input type="checkbox"/> 18TPAR <input type="checkbox"/> 18WPAR <small>(non-filer)</small>	<input type="checkbox"/> 18TSTU <input type="checkbox"/> 18WSTU <small>(non-filer)</small>	Initials: _____ Date: _____	Initials: _____ Date: _____	Initials: _____ Date: _____	

Student Name:

UID: U

**D. Tax Filing Information for 2018**

**STUDENT MUST SELECT FROM THE 2 OPTIONS BELOW**

**Student 2018 Taxes**

\* For calendar year 2018, **Student worked** or **Student did not work**

1. **Student filed a tax return for 2018.**  
Attach Tax Return Transcript or use IRS Data Retrieval Tool.
2. **Student did not file a 2018 tax return AND was not required to file**

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

**Add employer(s) ONLY IF no tax return was filed and student worked in 2018**

Employer _____	Amount earned \$ _____
Employer _____	Amount earned \$ _____
Employer _____	Amount earned \$ _____

**PARENT(S) MUST SELECT FROM THE 4 OPTIONS BELOW**

**Parent(s) 2018 Taxes**

\* For calendar year 2018,  **Parent 1 worked** or  **Parent 1 did not work**  
**Parent 2 worked** or **Parent 2 did not work**

**Attach: 2018 Tax Return Transcript(s) or use the IRS Data Retrieval Tool for each tax return filed.**  
**Attach: 2018 IRS Non-Filing Transcript for each Parent who did not file a tax return.**

1. **Parent 1 and Parent 2 filed a joint tax return for 2018**
2. **Parent 1 filed a tax return for 2018 and there is no other parent/stepparent in the household**

Note: If options 1 and 2 (above) do not apply, select appropriate boxes below. For example, 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.

3. **Parent(s) filed a separate tax return for 2018 and there are two parents in the household**

**Parent 1 filed a separate tax return for 2018**  
**Parent 2 filed a separate tax return for 2018**

4. **Parent(s) did not file a tax return for 2018**  
**Parent 1 did not file a 2018 tax return AND was not required to file**  
**Parent 2 did not file a 2018 tax return AND was not required to file**

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

**Add employer(s) ONLY IF no tax return(s) filed and parent(s) worked in 2018**

Employer _____	Amount earned \$ _____
Employer _____	Amount earned \$ _____
Employer _____	Amount earned \$ _____

**E. Untaxed Distributions from IRAs, Pensions, Annuities (2018 Form 1040, Line 4a – Line 4b)**

Student (If applicable)	Parent 1 (Both parents, if taxes filed jointly)	Parent 2 (If taxes filed separately)
<input type="checkbox"/> No IRA, Pension, Annuity Rollover	<input type="checkbox"/> No IRA, Pension, Annuity Rollover	<input type="checkbox"/> No IRA, Pension, Annuity Rollover
<input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover Amount \$ _____	<input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover Amount \$ _____	<input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover Amount \$ _____

## 2020-2021

### 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, D, and E 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 widow</i>	Legal parent and stepparent
Divorced or Separated	<p><b>Legal parent – the parent whom the student <i>lived with the most</i> during the 12 months prior to completing the FAFSA.</b></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><b>Legal parent – if they did not marry the other biological parent or anyone else.</b></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, 2020 - June 30, 2021. (*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 more than half support from July 1, 2020 – June 30, 2021.

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

## D. FAFSA requirements for Student and/or Parent(s) *who filed* a 2018 tax return

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

- 1.) Use the **\*\*IRS Data Retrieval Tool (DRT)** on the FAFSA to transfer tax information
- 2.) Obtain the **\*IRS Tax Return Transcript** for 2018 and submit a copy to Raider Connect
- 3.) Submit copy of 2018 tax return, Form 1040, that was filed with the IRS
  - a.) Requires taxpayer signature or signature/credentials of tax professional who prepared the return
  - b.) Must also submit Schedules 1, 2, and 3, if any of them were used for the tax return

### Additional documentation required if student's/parent(s)' 2018 tax return has been amended.

An AMENDED TAX RETURN is when a taxpayer corrects their tax return by filing IRS Form 1040X, or when the IRS makes a correction to the taxpayer's tax return.

- Submit **signed and dated** copy of IRS Form 1040X if student/parent(s) corrected their 2018 tax return.
- Submit 2018 IRS Tax Account Transcript if the IRS corrected the student's/parent(s)' 2018 tax return.

## D. FAFSA requirements for Student and/or Parent(s) *who did not file* a 2018 Tax Return

Dependent students **do not need to obtain** a Non-Filing Letter from the IRS if no tax return filed for 2018

Parent(s) **must obtain** a **\*Non-Filing Letter** from the IRS if no tax return filed for 2018

### Student and/or Parent(s) who earned money from work in 2018 but did not file a tax return

Sometimes people do not earn enough money to require them to file a tax return.

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

- 1.) Must provide copies of all W-2s for 2018 (or the IRS Wage & Income Transcript)
- 2.) On the Verification Worksheet, list names of all employers and amounts earned for 2018

## E. Untaxed Distributions from IRAs, Pensions, Annuities

Untaxed IRA Distributions,

Untaxed Pensions and Annuities

2018 IRS Tax Form 1040 (line 4a minus line 4b)

**If student's / parent(s)' tax return(s) show a ROLLOVER for all or part of the untaxed amount (calculated above), check the box for IRA/Pension Rollover on the Verification Worksheet and write in the rollover amount.**

## RESOURCES

\*IRS Tax Transcripts  
Wage & Income Transcript  
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>