

# 2018-2019 Dependent Verification General Instruction

Required by U.S Department of Education

Verification is the process used to confirm that the data reported on your FAFSA is accurate. This includes household and income information. If you are selected for verification, do not assume you are accused of doing anything wrong, the Department of Education selects most students at random for the verification process. **This form along with other requested documentation is used to verify income and household information to complete the verification process. You can see a list of your outstanding requirements on WINGS Express, or for new students not yet enrolled in classes, your Applicant Portal.**

**The process to verify your FAFSA information will begin after the Office of Financial Aid receives all of the requested verification forms and documentation.** You can check the status of the documents on WINGS Express. If the Office of Financial Aid needs additional documentation or has clarifying questions, the status of your requirement will be set to follow-up and a Financial Aid representative may contact you via your WSU e-mail account or by calling the phone number listed on the Verification Worksheet. For information regarding processing timeframes and submission deadlines, please visit <https://www.wright.edu/raider-connect/financial-aid/important-dates>.

When verifying your FAFSA information, if there are differences between your FAFSA and the required documentation you've provided, your FAFSA information will be corrected.

## Providing Documentation of Your 2016 Federal Taxes or Non-filing Status.

You may be asked to turn in documentation of your or your parent(s)/stepparent's 2016 Federal Taxes or documentation that your parent(s)/stepparent did not file a 2016 Federal Tax return with the IRS. Below are instructions on how to request documentation from the IRS based on your filing status.

### Tax Filer

Both parent(s)/stepparent and students who filed a 2016 federal tax return must either use the DRT or request an IRS Tax Return Transcript.

#### Using the Retrieval Tool (DRT)

Go to FAFSA.gov. Log into the FAFSA and select "Make FAFSA corrections". Navigate to the parent and/or student financial section. When using the DRT, do not modify income before transferring information to the FAFSA. Wright State University will receive confirmation from the department of education within 5 business days that the DRT tool was utilized.

Note: If the tax filer uses the FAFSA DRT and filed an amended tax return (1040X) they will need to request an IRS Tax Return Transcript.

#### Request an IRS Tax Return Transcript

**Get Transcript by MAIL** – Go to <https://www.irs.gov/individuals/get-transcript>, click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

**Get Transcript ONLINE** – Go to <https://www.irs.gov/individuals/get-transcript>, click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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. Transcript is generally received 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. On line 6 be sure to enter the tax form number (ex. 1040) and check box 6a. On line 9, enter the Year of period requested (ex. 12/31/2016). The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

### Non-Tax Filer

Parent(s)/stepparents who did not file and were not required to file a 2016 federal tax return must provide documentation that they did not file a 2016 federal tax return with the IRS. To document this status of non-filing, parents must request an IRS Tax Return Transcript dated on or after October 1, 2017. The IRS will provide a tax return transcript that states there is no record of return on file.

#### Request an IRS Tax Return Transcript for individuals who have never filed a tax return with the IRS.

**Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. Complete the form and mail it to the IRS using the instructions on page 2. For a non-filing letter be sure to check box 7, and on line 9 enter the year or period requested (ex. 12/31/2016). The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

#### Additional methods to request an IRS Tax Return Transcript for individuals who have filed a tax return with the IRS in previous years.

**Get Transcript ONLINE** – Go to <https://www.irs.gov/individuals/get-transcript>, click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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.

### REMEMBER to Check WINGS Express!

To check the status of your financial aid or view a list of your outstanding financial aid requirements, visit WINGS Express. For more information on how to navigate WINGS Express, visit <https://www.wright.edu/information-technology/services/student-support>. For assistance with campus user names and password resets call the Help Desk at (937) 775-4827 or 1-888-775-4827.

**New students who are not yet enrolled in classes view their next steps in the Admissions Portal at [wright.edu/apply](http://wright.edu/apply).**



**2018-2019  
Dependent  
Verification Worksheet**  
Required by U.S Department of Education

**Office of Financial Aid**  
130 Student Union  
3640 Colonel Glenn Hwy.  
Dayton, OH 45435-0001  
Phone: (937) 775-4000  
E-mail: raiderconnect@wright.edu  
FAX: (937) 775-4410

**D**

**A. Student Information**

Last Name	First Name, M.I.	<p><b>University ID (UID) - Required</b> <i>*Don't know your UID? See note below.</i></p> <table border="1" style="width:100%; height: 40px; border-collapse: collapse;"> <tr> <td style="width:10%; text-align: center;">U</td> <td style="width:10%; text-align: center;">0</td> <td style="width:10%; text-align: center;">0</td> <td style="width:10%;"></td> <td style="width:10%;"></td> <td style="width:10%;"></td> <td style="width:10%;"></td> <td style="width:10%;"></td> <td style="width:10%;"></td> <td style="width:10%;"></td> </tr> </table>	U	0	0							
U	0	0										
Student Cell Phone Number	Parent Daytime Phone Number	<p><b>**For assistance retrieving your UID call the Help Desk at (937) 775-4827 or 1-888-775-4827.</b></p>										

**B. Parent Household Information**

**List the people in your parent(s) household.** Members of your parent(s)' household may include:

- **YOU and YOUR PARENT(S) (including stepparent)** listed on your 2018-2019 FAFSA.
- Your parent(s)' children who will receive **more than half support** from your parent(s) from July 1, 2018 - June 30, 2019.
- Your parent(s)' children who would be considered **dependent** based on the 2018-2019 FAFSA dependency questions.
- Other people only if they now live with your parent(s), your parent(s) provide more than half of their support, **AND** your parent(s) will continue to provide more than half their support from July 1, 2018 - June 30, 2019.

Full Name	Age	Relationship to Student	Enter <b>College &amp; State</b> if person will be enrolled at Least Half Time in a Degree/Certificate Program between <b>July 1, 2018 -June 30, 2019.</b>	
		Self/Student	WRIGHT STATE UNIVERSITY	OHIO
		Parent 1	N/A	N/A
		Parent/ Stepparent 2 (if applicable)	N/A	N/A

**If you need more space, please attach a separate page**

**C. Certification**

By signing this worksheet, we certify that all information entered is complete and correct. *(Electronic signatures are not accepted)*

/ /	/ /	/ /	/ /
Parent Signature	Date	Student Signature	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"/> 16TPAR <input type="checkbox"/> 16WPAR (non-filer)	<input type="checkbox"/> 16TPAR <input type="checkbox"/> 16WPAR (non-filer)	<input type="checkbox"/> 16TSTU (filer) <input type="checkbox"/> 16WSTU (non-filer)	Initials: _____ Date: _____	Initials: _____ Date: _____	Initials: _____ Date: _____	

**D. Parent(s)/Stepparent Information**

For each parent/stepparent listed in the household, complete the 2016 Tax Filer and/or 2016 Non-Tax Filer sections based on each parent/stepparent's tax filing status.

**Parent/Stepparent 2016 TAX FILERS ONLY**

Complete this section for each parent/stepparent listed in the household on the previous page who filed a 2016 Federal Tax Return. If your parent(s)/stepparent did not file and were not required to file taxes for 2016, complete the Parent/Stepparent 2016 Non-Tax Filers Only section.

**1. The parent/stepparent tax filer must use the FAFSA DRT Tool or submit a copy of the 2016 Federal Tax Return Transcript.**

- Check here if parent(s)/stepparent used the FAFSA IRS Data Retrieval Tool or are submitting a copy of their 2016 Federal Tax Return(s) Transcript with this form.
- Check here if one or both your parents will submit a copy of their 2016 Federal Tax Return Transcript or will use the FAFSA IRS Data Retrieval Tool at a later date. *For more information about providing 2016 tax information, view the first page of general instructions.*

*Tax filers who have filed an amended tax return (1040X) or filed a non-IRS tax return (e.g., a foreign tax return) you may be required to submit additional documentation. For more information about providing 2016 tax information, visit <http://www.wright.edu/raider-connect/loans-scholarships-and-grants/fafsa-verification-process#tax>.*

**2. The parent/stepparent tax filer had a transfer of holdings of one IRA to another (rollover) in 2016?**

- No.  Yes. If yes, enter the rollover amount in the box.

*Rollover may be all or part of 1040 lines 15a minus 15b (or 1040A lines 11a minus 11b).*

\$

**3. The parent/stepparent tax filer had a transfer of holdings of one pension or annuity to another (rollover) in 2016?**

- No.  Yes. If yes, enter the rollover amount in the box.

*Rollover may be all or part of 1040 lines 16a minus 16b (or 1040A lines 12a minus 12b).*

\$

**Parent/Stepparent 2016 NON-TAX FILERS ONLY**

Complete this section for each parent/stepparent listed in the household on the previous page who will not file and are not required to file a 2016 income tax return with the IRS.

**1. The parent/stepparent non-tax filer must submit a Tax Return Transcript dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority. This is to document their non-filing status with the relevant tax authority.**

- Check here if parent(s)/stepparent are submitting a copy of the 2016 Federal Tax Return(s) Transcript, which documents the status of non-filing, with this worksheet.
- Check here if parent(s)/stepparent will submit a copy of the 2016 Federal Tax Return(s) Transcript, which documents the status of non-filing, at a later date. *For more information about providing documentation of non-filing, view the first page of general instructions.*

**2. The parent/stepparent non-tax filer must submit documentation of his/her earnings from employment.**

- Check here if parent(s)/stepparent was not employed and had no income earned from work in 2016.
- Check here if parent(s)/stepparent was employed in 2016. *Complete the table below using the provided instructions.*

Enter the name of the parent/stepparent, employer(s), and the amount earned in 2016. **NOTE:** Attach a copy of the **W-2** for each employer. If a copy is not available, attach a statement explaining why a W-2 cannot be obtained. If you earned business or miscellaneous income, a 1099 or business schedules may be requested.

Parent/Stepparent's Name	Employer's Name	2016 Amount Earned	W-2 Attached?
		\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
		\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
		\$	<input type="checkbox"/> Yes <input type="checkbox"/> No

## E. Student Information

Complete the Federal Work Study Earnings section and either the 2016 Tax Filer or 2016 Non-Tax Filer section based on your tax filing status.

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### Student 2016 Federal Work-Study Earnings

1. Did you earn any Federal Work-Study in 2016?  No.  Yes. If yes, answer the questions below.

Amount of Federal Work-Study you (the student) earned in 2016: \$ \_\_\_\_\_

Enter name of the school where Work-Study was earned: \_\_\_\_\_

### Student 2016 TAX FILERS ONLY

Complete this section if you filed a 2016 Federal Tax Return. If you did not file and where not required to file taxes for 2016, complete the Student 2016 non-tax filer only section.

1. You, the tax-filer, must submit documentation of your filing status with the IRS.

- Check here if you used the FAFSA IRS Data Retrieval Tool or are submitting a copy of your 2016 Federal Tax Return Transcript with this form.
- Check here if you will submit a copy of your 2016 Federal Tax Return Transcript or will use the FAFSA IRS Data Retrieval Tool at a later date. *For more information about providing 2016 tax information, view the first page of general instructions.*

*Tax filers who have filed an amended tax return (1040X) or filed a non-IRS tax return (e.g., a foreign tax return) you may be required to submit additional documentation. For more information about providing 2016 tax information, visit <http://www.wright.edu/raider-connect/loans-scholarships-and-grants/fafsa-verification-process#tax>.*

2. You, the tax-filer, had a transfer of holdings of one IRA to another (rollover) in 2016?

No.  Yes. Enter the rollover amount in the box.  
Rollover may be all or part of 1040 lines 15a minus 15b (or 1040A lines 11a minus 11b).

\$

3. You, the tax-filer, had a transfer of holdings of one pension or annuity to another (rollover) in 2016?

No.  Yes. Enter the rollover amount in the box.  
Rollover may be all or part of 1040 lines 16a minus 16b (or 1040A lines 12a minus 12b).

\$

### Student 2016 NON-TAX FILERS ONLY

Complete this section if you will not file and are not required to file a 2016 income tax return with the IRS.

1. You, the non-tax filer, must submit documentation of your earnings from employment.

- Check here if you were not employed and had no income earned from work in 2016.
- Check here if you were employed in 2016. *Complete the table below using the provided instructions.*

Enter the name of the employer(s) and the amount earned in 2016. **NOTE:** Attach a copy of the **W-2** for each employer. If a copy is not available, attach a statement explaining why a W-2 cannot be obtained. If you earned business or miscellaneous income, a 1099 or business schedules may be requested.

Employer's Name	2016 Amount Earned	W-2 Attached?
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No