



2021-2022 Independent Verification Worksheet

Required by the U.S Department of Education

Raider Connect
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A. Student Information

		University ID (UID) – Required.
Last Name _____	First Name M.I. _____	U
Student Cell Phone Number _____	Student Other Number _____	<i>For assistance retrieving your UID Contact the Help Desk: 937-775-4827 or 1-888-775-4827</i>
Age: _____	Last 4 of SSN: _____	

B. Student/Spouse Household Information

- List name, age, SSN, etc. of spouse, if married.

	First and Last Name	Age	Last 4 of SSN	College name – if attending at least ½ time from 7/1/21-6/30/22	State – where college is located
Spouse			xxx-xx-		

- List children of student/spouse below for whom student/spouse, if married, will provide *more than half* their support **July 1, 2021 - June 30, 2022**, even if they do not live with them. **Do not include children for whom child support is paid.**
- List other people below who are not your children, **only if** they now live with you **AND** you provide *more than half* their support **AND** will continue to provide *more than half* their support **July 1, 2021 - June 30, 2022**.

First and Last Name (Other Household Members)	Age	Relationship to Student	College name – if attending at least ½ time during 7/1/21-6/30/22	State – where college is located

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

C. Certification - I (We) certify that all information entered is complete and correct.

Forms that cannot be signed electronically with DocuSign® must be printed and hand-signed. Signatures cannot be typed, copied & pasted, superimposed, or created with a mouse or stylus.

/ /		/ /	
Student Signature	Date	Spouse Signature (optional)	Date

For Office Use Only (VRINDE - Indep Ver Worksheet)					Date Stamp
Student	Spouse	Submit to Review:	ROAUSDF Review:	Complete:	
<input type="checkbox"/> 19TIND	<input type="checkbox"/> 19TIND	Initials: _____	Initials: _____	Initials: _____	
<input type="checkbox"/> 19WIND (non-filer)	<input type="checkbox"/> 19WIND (non-filer)	Date: _____	Date: _____	Date: _____	

Student Name:

UID:

D. Tax Filing Information for 2019

STUDENT AND SPOUSE (IF MARRIED) MUST COMPLETE THIS SECTION - CHECK ALL BOXES THAT APPLY

Student/Spouse 2019 Taxes

Student/Spouse filed a 2019 Tax Return

Joint Tax Return filed

Student and **Spouse** filed a joint tax return

Student filed – No spouse in household

Student filed a tax return AND there is no spouse in the household

Separate Return(s) filed

Spouse filed a separate tax return

Student filed a separate tax return

Provide one tax document for each return filed

- Use the IRS Data Retrieval Tool on the 2021-2022 FAFSA
- Send a copy of the 2019 Federal IRS Tax Return Transcript
- Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1, 2, & 3, if filed with the tax return

Student/Spouse did not file a 2019 Tax Return

- Student** did not file 2019 tax return AND was not required to file
Spouse did not file 2019 tax return AND was not required to file

Worked/Did not work – if student/spouse did not file a tax return

Student did not work in 2019

Spouse did not work in 2019

Student worked in 2019

Spouse worked in 2019



W-2s attached
REQUIRED IF TAX RETURN NOT FILED

Write in 2019 employment information if no tax return filed

Employer _____ Amount earned \$ _____

Employer _____ Amount earned \$ _____

Employer _____ Amount earned \$ _____

Employer _____ Amount earned \$ _____

E. Untaxed Distributions from IRAs, Pensions, Annuities (2019 IRS Form 1040, Line 4a minus 4b and Line 4c minus 4d)

Student (Both student & spouse, if taxes filed jointly)	Spouse (If taxes filed separately)	
No IRA, Pension, Annuity Rollover	No IRA, Pension, Annuity Rollover	
Yes, IRA, Pension, Annuity Rollover Amount \$ _____	Yes, IRA, Pension, Annuity Rollover Amount \$ _____	

2021-2022

Independent 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. Other Household Members INCLUDE:

Student's / spouse's children (even if they do not live with them) – who will receive more than half their support from student / spouse from July 1, 2021 - June 30, 2022. (*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.

Student's / spouse's adult children who are not yet 24, not married, not a veteran, not active duty military, who do not live with them; but they would be required to put student and spouse (if applicable) on their own FAFSA if they also attend college.

Other people, **ONLY IF** they live with student/spouse now **AND** receive more than half their support from student/spouse **AND** will continue to receive more than half support from July 1, 2021 – June 30, 2022.

Does **not** include foster children for whom student/spouse receive a subsidy.

Does **not** include children whom student/spouse 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/Spouse **who filed** a 2019 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 2019 and submit a copy to Raider Connect
- 3.) Submit copy of 2019 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/spouse's 2019 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/spouse corrected their 2019 tax return.
- Submit 2019 IRS Tax Account Transcript if the IRS corrected the student's/spouse's 2019 tax return.

D. FAFSA requirements for Student/Spouse **who did not file** a 2019 Tax Return

Student/Spouse **must obtain** a ***Non-Filing Letter** from the IRS if no tax return filed for 2019

Student / Spouse earned money from work in 2019 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 2019 (or the IRS Wage & Income Transcript)
- 2.) On the Verification Worksheet, list names of all employers and amounts earned for 2019

E. Untaxed Distributions from IRAs, Pensions, Annuities

Untaxed IRA Distributions,
Untaxed Pensions and Annuities

2019 IRS Tax Form 1040 (line 4a minus line 4b)

2019 IRS Tax Form 1040 (line 4c minus line 4d)

*If student's/spouse'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 financial section. Upon being successful with transferring the tax information into the FAFSA, **sign it with your FSA ID 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>