



2019-2020 Independent Verification Worksheet

Required by the U.S Department of Education

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A. Student Information

		University ID (UID) – Required.										
Last Name ()	First Name M.I. ()	<table border="1" style="margin: auto;"> <tr> <td style="width: 20px; text-align: center;">U</td> <td style="width: 20px; text-align: center;">0</td> <td style="width: 20px; text-align: center;">0</td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> </tr> </table>	U	0	0							
U	0	0										
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>										

B. Student Household Information

List: Name of spouse, if married.

	First and Last Name	Age	Last 4 of SSN	College name – if attending at least ½ time from 7/1/19-6/30/20	State – where college is located
Spouse			xxx-xx-		

List:

- Children of student/spouse for whom student/spouse (if applicable) will provide *more than half* their support from July 1, 2019 - June 30, 2020, even if they do not live with them.
- Other people who are **not** your children, **ONLY IF** they live with you now **AND** you provide more than half their support **AND** will continue to provide more than half their support from 7/1/19 - 6/30/20.

First and Last Name (Other Household Members)	Age	Relationship to Student	College name – if attending at least ½ time during 7/1/19-6/30/20	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. *(Actual Signatures Required. Form may be emailed or faxed.)*

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

For Office Use Only (VRINDE - Indep Ver Worksheet)					Date Stamp
Student	Spouse	Submit to Review:	ROAUSDF Review:	Complete:	
<input type="checkbox"/> 17TIND	<input type="checkbox"/> 17TIND	Initials: _____	Initials: _____	Initials: _____	
<input type="checkbox"/> 17WIND (non-filer)	<input type="checkbox"/> 17WIND (non-filer)	Date: _____	Date: _____	Date: _____	

Student Name:

UID: U00

D. Federal Work-Study Earnings for 2017

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

If Yes, answer these questions:

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

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

E. Tax Filing Information for 2017

STUDENT (AND SPOUSE, IF APPLICABLE) MUST SELECT FROM THE 4 OPTIONS BELOW

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 Student or Spouse who *did not file a tax return*.

Student/Spouse 2017 Taxes

- 1. **Student filed a tax return for 2017 and there is not a spouse in the household**
- 2. **Student and Spouse filed a joint tax return for 2017**

Note: If options 1 and 2 (above) do not apply, select appropriate boxes below.
 For example, if the student is married and either the student or spouse filed a tax return, but the other one did not file a tax return, check the appropriate boxes for options 3 and 4.

- 3. **Student and/or spouse filed a separate tax return for 2017**

- Student filed a separate tax return for 2017**
- Spouse filed a separate tax return for 2017**

- 4. **Student and/or Spouse did not file a tax return for 2017**

- Student did not file a tax return and was not required to file** **WORKED** or **DID NOT WORK**
- Spouse did not file a tax return and was not required to file** **WORKED** or **DID NOT WORK**

Add employer(s) ONLY IF no tax return was filed and parent(s) worked in 2017

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

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

F. IRA and Pension or Annuity Distributions on Student's and/orhy Spouse's 2017 Tax Returns

Student (Or Student and Spouse if taxes filed jointly)	Spouse (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"/> Yes, IRA Rollover \$ _____	<input type="checkbox"/> Yes, IRA Rollover \$ _____	
<input type="checkbox"/> Yes, Pension Rollover \$ _____	<input type="checkbox"/> Yes, Pension Rollover \$ _____	

2019-2020

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, E, and F 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, 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.

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'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/Spouse **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 Spouse 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/Spouse **who did not file** a 2017 Tax Return

Student/Spouse **must obtain** a ***Non-Filing Letter** from the IRS if no tax return filed for 2017

Student/Spouse 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/Spouse Tax Return(s)	
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)
<i>If student's/spouse's tax return(s) show 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.</i>	

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