



**2020-2021**  
**Independent**  
**Verification Worksheet**  
 Required by the U.S Department of Education

**Raider Connect**  
 130 Student Union  
 3640 Colonel Glenn Hwy.  
 Dayton, OH 45435-0001  
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**A. Student Information**

		<b>University ID (UID) – Required.</b>		
Last Name _____	First Name M.I. _____	<table border="1" style="width:100%; height: 40px;"> <tr> <td style="width: 20px; text-align: center;"><b>U</b></td> <td></td> </tr> </table>	<b>U</b>	
<b>U</b>				
Student Cell Phone Number _____	Student Other 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. Student/Spouse Household Information**

List below: Spouse, if married.

	First and Last Name	Age	Last 4 of SSN	College name – if attending at least ½ time from 7/1/20-6/30/21	State – where college is located
<b>Spouse</b>			xxx-xx-		

- List below:
- Children of the student/spouse for whom student/spouse, if applicable, will provide *more than half* their support from July 1, 2020 - June 30, 2021, even if they do not live with them. Exclude child if you pay child support for 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 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**

I (we) certify that all information entered is complete and correct. (Handwritten Signature Required. Form may be emailed or faxed.)

/ / / /

**Student Signature** \_\_\_\_\_ **Date** \_\_\_\_\_ **Spouse Signature (optional)** \_\_\_\_\_ **Date** \_\_\_\_\_

For Office Use Only (VRINDO - Indep Ver Worksheet)					Date Stamp
Student	Spouse	Submit to Review:	ROAUSDF Review:	Complete:	
<input type="checkbox"/> 18TIND	<input type="checkbox"/> 18TIND	Initials: _____	Initials: _____	Initials: _____	
<input type="checkbox"/> 18WIND (non-filer)	<input type="checkbox"/> 18WIND (non-filer)	Date: _____	Date: _____	Date: _____	

**D. Tax Filing Information for 2018**

Student/Spouse 2018 Taxes

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

\* For calendar year 2018,  Student *worked* or  Student *did not work*  
 Spouse *worked* or  Spouse *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 Student or Spouse who *did not file a tax return*.

1.  Student *filed a tax return* for 2018 and there is not a spouse in the household
2.  Student and Spouse *filed a joint tax return* for 2018

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 in options 3 and 4.

**3. Student and/or spouse filed a separate tax return for 2018**

- Student *filed a separate tax return* for 2018
- Spouse *filed a separate tax return* for 2018

**4. Student and/or Spouse did not file a tax return for 2018**

- Student *did not file* a 2018 tax return AND *was not required to file*
- Spouse *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 student or spouse worked in 2018**

Employer \_\_\_\_\_ Amount earned \$ \_\_\_\_\_  
 Employer \_\_\_\_\_ Amount earned \$ \_\_\_\_\_  
 Employer \_\_\_\_\_ Amount earned \$ \_\_\_\_\_

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

Student (Both student & spouse, if taxes filed jointly)	Spouse (If taxes filed separately)	
<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 \$ _____	

# 2020-2021

## 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, 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.**

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, 2020 – June 30, 2021.

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 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/spouse'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/spouse corrected their 2018 tax return.
- Submit 2018 IRS Tax Account Transcript if the IRS corrected the student's/spouse's 2018 tax return.

#### D. FAFSA requirements for Student/Spouse **who did not file** a 2018 Tax Return

Student/Spouse **must obtain** a **\*Non-Filing Letter** from the IRS if no tax return filed for 2018

#### **Student/Spouse 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/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>