

2019–2020 Verification Worksheet V1– Independent Student

Your 2019–2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information our financial aid advisor will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the Office of Financial Aid. We may ask for additional information. If you have questions about verification, contact your financial aid advisor as soon as possible so that your financial aid will not be delayed.

A. Independent Student’s Information

| | | | |
|----------------------------|------------|----------|---------------|
| Last Name | First Name | M.I. | ID Number |
| Address (include apt. no.) | | | Date of Birth |
| City | State | Zip Code | Phone Number |

B. Independent Student’s Family Information

List below the people in your household. Include:

- Yourself (and your spouse, if you are married).
- Your children, if any, if you will provide more than half of their support from July 1, 2019, through June 30, 2020, or if the child would be required to provide your information if they were completing a FAFSA for 2019-2020. Include children who meet either of these standards, even if they do not live with you. If the child is unborn, include the due date (month and year).
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2020.

Include the name of the college for any household member who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2019, and June 30, 2020. If more space is needed, attach a separate page.

| Full Name | Age | Relationship | College |
|------------------------------|-----------|--------------|--------------------------|
| <i>Missy Jones (example)</i> | <i>28</i> | <i>wife</i> | <i>Suny Old Westbury</i> |
| | | <i>Self</i> | |
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C. Independent Student’s Income Information to Be Verified

IMPORTANT NOTE: Tax Return Filers – If you (or your spouse, if married) filed, or will file, an amended 2017 IRS tax return, you must contact the Office of Financial Aid before completing this section.

1. Student’s Income Information

Instructions: Check the box that applies:

- The student has filed or will file a 2017 IRS Tax Return. *(See instructions section below for required documentation.)*
- Check here if the student’s 2017 IRS Tax Return Transcript are attached to this worksheet. (W’2’s if asked by my school)
 OR
 Check here if the student has used the IRS DRT in FAFSA on the Web to transfer 2017 IRS income tax return information into the student’s FAFSA.
- The student was not employed and had no income earned from work in 2017.
- The student was employed in 2017 but not required to file a 2017 IRS tax return. Below you must list the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is attached. Attach copies of all 2017 W-2 forms issued to you by employers. List every employer even if they did not issue an IRS W-2 form.

| Employer’s Name | 2017 Amount Earned | IRS W-2 Attached? |
|--|-----------------------------|----------------------|
| <i>Suzy’s Auto Body Shop (example)</i> | <i>\$2,000.00 (example)</i> | <i>Yes (example)</i> |
| | | |
| | | |

2. Spouse's Income Information

If you, the student, are unmarried leave spouse information blank.

Instructions: Check the box that applies:

- The student's spouse has filed or will file a 2017 IRS Tax Return. (See instructions section below for required documentation.)

_____ Check here if the spouse's 2017 IRS Tax Return Transcript are attached to this worksheet. (W'2's if asked by my school)

OR

_____ Check here if the spouse has used the IRS DRT in FAFSA on the Web to transfer 2017 IRS income tax return information into the student's FAFSA.

- The student's spouse was not employed and had no income earned from work in 2017
- The student's spouse was employed in 2017 but not required to file a 2017 IRS tax return. Below you must list the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is attached. Attach copies of all 2017 W-2 forms issued to you by employers. List every employer even if they did not issue an IRS W-2 form.

| Employer's Name | 2017 Amount Earned | IRS W-2 Attached? |
|---------------------------------|----------------------|-------------------|
| Suzy's Auto Body Shop (example) | \$2,000.00 (example) | Yes (example) |
| | | |
| | | |
| | | |

D. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature Date

Spouse's Signature Date

**Submit this worksheet and any other required documents to Suny College at Old Westbury Office of Financial Aid
E-mail: financialaid@oldwestbury.edu**

Instruction Section for Tax Filers

Option 1 – Use the IRS DRT Tool

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool (IRS DRT). If you need more information about when, or how to use the IRS Data Retrieval Tool, please contact the Financial Aid Office.

Option 2 – Request an IRS Tax Return Transcript

If you do not meet the requirements or choose not to use the IRS Data Retrieval Tool, you are required to submit yours, and your spouse's if married, IRS tax return transcript to the financial aid office. If you are married and you and your spouse filed separate 2017 tax returns, you must submit tax return transcripts for both you and your spouse.

Online Request - go to www.irs.gov and click on the "Get Transcript of Your Tax Records" link. Click "Get Transcript ONLINE" or "Get Transcript by MAIL". Make sure to request the "IRS Tax Return Transcript". **Telephone Request** – 1-800-908-9946 **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T

Note: Once you have filed your return with the IRS it may take up to two weeks for IRS income information to be available for electronic tax return filers, and up to eight weeks for paper tax return filers. You must wait until your IRS income information is available before choosing either option.