2020-2021

Independent Verification Worksheet

Your application was selected for review in a process called Verification. In this process, we must compare information from your FAFSA application with information from your **2018** Federal tax data. The law states we must ask you for this information before awarding Federal aid. If there are differences between your FAFSA application information and your Federal tax data, we may need to make corrections electronically to your FAFSA.

Submit this information to the Office of Financial Aid at Marymount as soon as possible. This form needs to be filled out completely and signed. Upon review of the documentation you submit, additional information may be required; notification of such will be made as quickly as possible.

A. Student Information   (Please Print)

Last name	First name	M.I.

Student's Social Security Number *required*

Address (include apt. #)

Date of birth

City	State	Zip Code

Phone number (include area code)

Student Email

B. Family Information

List the people in your household, including:
- yourself and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2020 through June 30, 2021, even if they do not live with you and;
- 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 from July 1, 2020 through June 30, 2021.

Write the names of all household members in the space(s) below. Also write in the name of the college that any household member will be attending at least half time between July 1, 2020 and June 30, 2021. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		Self	**Marymount University**

C. Student Income Verification (all applicants)

1. THE **QUICKEST WAY TO HAVE INCOME VERIFIED IS TO USE THE IRS DATA RETRIEVAL TOOL.**
   The IRS Data Retrieval Tool will import your Federal Tax information into your FAFSA form. To use it:
   - Go to www.FAFSA.ed.gov and log into the students FAFSA.
   - Select *Make FAFSA Corrections* and navigate to the *STUDENT INFORMATION* section of the FAFSA form.
   - Follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2018 IRS income tax information. **If ineligible, continue on to #2**.

2. Request a tax return transcript from the IRS by calling 800-908-9946 OR You may submit your request online at https://www.irs.gov. Click on "Get Your Tax Record", then choose whether you want to get it online or by mail. Be sure to request a tax **return** transcript for the 2018 tax year - a tax **account** transcript is not acceptable. (Add the student's name and ID # to each page)

3. After reviewing steps 1 and 2 above, please, check *one* box below:

   ☐ Check here if you used the IRS Data Retrieval tool on the FAFSA.
   ☐ Check here if you are attaching a copy of your **2018 Tax Return Transcript** (ADD THE STUDENT'S NAME AND ID# ON EACH PAGE).
   ☐ Check here if you did not file and WERE NOT required to file a 2018 U.S. Income Tax Return.
   Please complete the box below and follow the instructions in #3.

   If you did not file and were not required to file a 2018 Federal income tax return, list below your employer(s) and any income received in 2018. **You must attach the W-2 or other earnings statements with this form.**

Sources	2018 Income
	$
	$

4. If you did not and were not required file a tax return for 2018, you **MUST** provide documentation from the IRS that confirms this. Complete IRS form 4506-T, checking Box 7. You can mail or fax to the IRS as the 4506-T shows. Once they respond, you must submit that confirmation to us.

   Check one of the following:
   ☐ Check here if IRS confirmation of non-filing is attached.
   ☐ Check here if IRS confirmation of non-filing will be provided later.

D. Spouse Income Verification (if student is married)

THE QUICKEST WAY TO HAVE INCOME VERIFIED IS TO USE THE IRS DATA RETRIEVAL.
The IRS Data Retrieval Tool will import your Federal Tax information into your FAFSA form. To use it:

   - Go to www.FAFSA.ed.gov and log into the student's FAFSA.
   - Select **Make FAFSA Corrections**, and navigate to the *STUDENT INFORMATION* section of the FAFSA form.
   - Follow the instructions to determine if the spouse is eligible to use the IRS Data Retrieval Tool to transfer 2018 IRS income tax information. **If ineligible, go to Step 1**.

1. Request a tax return transcript from the IRS by calling 800-908-9946 OR You may submit your request online at https://www.irs.gov. Click on "Get Your Tax Record", then choose whether you want to get it online or by mail. Be sure to request a tax **return** transcript for the 2018 tax year - a tax **account** transcript is not acceptable.
(Add the student's name and ID # on each page)

2. After reviewing the instructions given above, please check *one* of the following:

☐ Check here if your spouse used the IRS Data Retrieval tool on the FAFSA.

☐ Check here if you are attaching a copy of your spouse's **2018 Tax Return Transcript**
(ADD THE STUDENT'S NAME AND ID# ON EACH PAGE).

☐ Check here if your spouse did not file and WAS NOT required to file a 2018 U.S. Income Tax Return.
Please complete the box below.

If your spouse did not file and was not required to file a 2018 Federal income tax return, list below your spouse's employer(s) and any income received in 2018. **You must attach the W-2 or other earnings statements with this form.**

Sources	2018 Income
	$
	$

3. If your spouse did not and was not required to file a tax return for **2018**, you **MUST** provide documentation from the IRS that confirms this. Complete IRS form 4506-T, checking Box 7. You can mail or fax as the 4506-T shows. Once they respond, you must submit that confirmation to us.

Check the following:

☐ Check here if IRS confirmation of non-filing is attached.

☐ Check here if IRS confirmation of non-filing will be provided later.

E. Sign this Worksheet

I certify that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Marymount University for the 2020-2021 academic year. Each person signing this form certifies that all the information reported on it is complete and correct. *If married, spouse's signature is optional.*

_____
Student   Date

_____
Spouse   Date

Submit this worksheet to the Office of Financial Aid.