



Office of Student Financial Aid
1972 Clark Ave., Alliance, OH 44601
phone: (330) 823-2674
toll free: (877) 543-9185
fax: (330) 829-2814
email: finaid@mountunion.edu

2018-2019 Verification Worksheet Independent Student

**Complete no later than September 1, 2018.
This form is required to process your Financial Aid.**

Student Name: _____

Last 4 of Student ID: _____

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) was selected for a review process called verification. Verification selection can be random or because your FAFSA data was incomplete, estimated, or inconsistent. The U.S. Department of Education selects some students for verification while the University also reserves the right to select others if we find conflicting information.

Per federal regulation, the University of Mount Union Office of Student Financial Aid must confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information, our office will compare your FAFSA with the information on this worksheet and with any other required documents such as Federal tax documents, W-2 forms, etc. If there are discrepancies, we will make corrections and update your FAFSA. Corrections may result in a change to your Federal, State and Institutional eligibility. **You and your spouse (if applicable) must complete sections A through D and sign this worksheet, attach any required documents, and submit the form to the Office of Student Financial Aid.** If you have questions about verification, contact our office as soon as possible so that your financial aid is not delayed

NOTE: NOTE: PLEASE DO NOT SUBMIT YOUR DOCUMENTS WITH PERSONAL IDENTIFIABLE INFORMATION VIA E-MAIL OR FAX. This includes but is not limited to: W-2s, tax transcripts, court documents, etc. These must be presented in person. Please reach out to our office if you have any questions.

SECTION A: INCOME INFORMATION

1. Follow these instructions if you did NOT file 2016 taxes and were NOT required to file. If you filed taxes move to step 2 on the next page.

Student: If you did not file taxes and were not required to file a 2016 income tax return, complete the "Verification of 2016 Income" section on the next page. Report your 2016 income and check the box in section 2 that applies to you. Submit all 2016 W-2 forms with this worksheet.

Spouse: If you did not file taxes in 2016, You must submit a Verification of Non-Filing Statement from the IRS. Go to <https://www.irs.gov/forms-pubs> and click "Form 4506-T". Complete the form and check box 7. You will then need to mail or fax the form to the IRS. A Verification of Non-Filing Letter will be mailed to you. A copy must be returned with this worksheet to the Office of Student Financial Aid. You will also need to complete the "Verification of 2016 Income" section on the next page. Report your 2016 income and check the box in section 2 that applies to you. Submit all 2016 W-2 forms with this worksheet.

2. Follow these instructions if you FILED 2016 taxes.

Student and spouse: If you did file taxes in 2016, you can retrieve your tax information a few different ways, however the easiest and most efficient way of retrieving this information is directly from the IRS via the Data Retrieval Tool (DRT) located on the FAFSA. If you did not use the data retrieval tool, you can request your 2016 tax transcript directly from the IRS. Follow the instructions below to use DRT or request a 2016 tax transcript from the IRS. You will also need to submit all 2016 W-2 forms for both student and parent(s).

1. **Use the IRS Data Retrieval Tool to transfer 2016 tax data to the FAFSA.** Log in at fafsa.gov and click on "Make FAFSA Corrections." On the FAFSA, in the Financial Information sections(s), click "Link to IRS." (spouse financial section will be first, then the student financial section will follow.) On the IRS website, fill out the form and click on "Transfer my tax information into the FAFSA." Lastly, resubmit the FAFSA (we will be notified electronically).
2. **Request the transcript online at www.irs.gov.** Under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
3. **Request a transcript copy by mail at www.irs.gov.** Under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."

PLEASE NOTE: WE ARE NO LONGER ABLE TO ACCEPT COPIES of 1040 TAX DOCUMENTS, THEY MUST BE TAX RETURN TRANSCRIPTS.

VERIFICATION OF 2016 INCOME:

Spouse:

1. Check the box that applies:
 - I was not required to file a 2016 Federal Tax Return and had no income.
 - I was not required to file a 2016 Federal Tax Return. I attached all 2016 W-2 forms and the IRS Confirmation of Non-Filing.
 - I filed a 2016 tax return and used the IRS Data Retrieval Tool. I have attached a copy of all 2016 W-2 forms.
 - I filed a 2016 tax return, am unable to use the IRS Data Retrieval Tool. I have attached a copy of the 2016 Tax Return Transcript and all 2016 W-2 forms.
2. Report the income earned. If none, list N/A or zero. List all employers.

Earnings in 2016: \$ _____ (You must submit copies of all W-2s)

Employer Name	Amount Earned

Student:

1. Check the box that applies:
 - I was not required to file a 2016 Federal Tax Return and had no income.
 - I was not required to file a 2016 Federal Tax Return and have attached all 2016 W-2 forms.
 - I filed a 2016 tax return and used the IRS Data Retrieval Tool. I have attached a copy of all 2016 W-2 forms.
 - I filed a 2016 tax return, am unable to use the IRS Data Retrieval Tool. I have attached a copy of the 2016 Tax Return Transcript and all 2016 W-2 forms.

2. Report the income earned. If none, list N/A or zero. List all employers.

Total earnings in 2016: \$ _____ (You must submit copies of all W-2s)

Employer Name	Amount Earned

SECTION B: HOUSEHOLD INFORMATION

1. List the members in your household in the chart on the next page. Include the following:
 - a. Yourself and your spouse (if applicable).
 - b. Your spouse’s other children if you will provide more than half of the children’s support from July 1, 2018, through June 30, 2019, or if the other children would be required to provide parental information if they were completing a FAFSA for 2018– 2019. Include children who meet either of these standards, even if a child does not live with you.
 - c. Other people if they now live with the you or your spouse and you and your spouse provide more than half of the other person’s support and will continue to provide more than half of that person’s support through June 30, 2019.
2. Include in the chart on the next page information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2018, and June 30, 2019, and include the name of the college. If you need more space, attach an additional sheet to this worksheet.

	Full Name	Age	Relationship to student	College Attending	Will they be enrolled in at least 6 hours?	Will your parents provide more than half of their financial support?
1.			Self	University of Mount Union	Yes	Yes
2.					Yes No	Yes No
3.					Yes No	Yes No
4.					Yes No	Yes No
5.					Yes No	Yes No
6.					Yes No	Yes No

SECTION C: MARITAL STATUS

As of the date I filed the 2018–19 financial aid application, I, the student, am (check one box below)

- Never Married Married/Remarried Unmarried/both parents living together
 Divorced or Separated Widowed

Month and year, you were either divorced, separated, married/remarried or widowed: _____

SECTION D: CERTIFICATION

- I hereby declare that all the information reported on this document is true, complete, and accurate to the best of my knowledge.
 I understand that any false statement or misrepresentation will be cause for denial, reduction, cancellation, and/or repayment of financial aid.
 I understand that the tax information and information provided on this worksheet could change my financial aid. It is my responsibility to review the updated award information I receive once verification is completed.

Student Name: _____ Date: _____

Student Signature: _____

Spouse Name: _____ Date: _____

Spouse Signature: _____

Parent Email: _____