

# 2019-2020 Verification Worksheet

## Federal Student Aid Programs

### A. What is Verification? What must I do?

Your 2019-20 Free Application for Federal Student Aid (FAFSA) was selected by the U.S. Department of Education for review in a process called "Verification." The Financial Aid Office must compare your FAFSA with this worksheet and other financial data you submit and make any necessary corrections. The Financial Aid Office cannot make any federal financial aid available until all verification requirements have been met and the necessary corrections have been made.

**INSTRUCTIONS:**

1. Complete this worksheet. You and at least one parent must sign. If your parents are divorced or separated, answer the questions about the parent whose information was included on your FAFSA. If that parent is remarried, answer the question about that parent and your stepparent.
2. If you or your parent filed a 2017 tax return, use the IRS Data Retrieval Tool in *FAFSA on the Web* (<https://studentaid.ed.gov/sa/fafsa>) to import parents' and student's 2017 tax data into your FAFSA. Visit the website [www.tinyurl.com/FinAid3](http://www.tinyurl.com/FinAid3) for a short tutorial showing how to use the IRS Data Retrieval Tool.

As an alternative to using the IRS Data Retrieval Tool, you and your parents may provide a signed copy of your 2017 federal tax return(s) with all schedules and forms normally sent to the IRS or a "Tax Return Transcript" received from the IRS.

If you did not file and were not required to file a 2017 IRS income tax return, complete the appropriate line item on page two of this form and provide the requested information and documents for that item.

If you or your parents have been a victim of IRS tax-related identity theft, send an e-mail to our office at [FinAid@ThomasAquinas.edu](mailto:FinAid@ThomasAquinas.edu) to obtain further instructions.

3. Return this worksheet and any necessary documents through our Secure File Upload Portal (<https://thomasaquinas.edu/fa-upload>) or by mail to: **Thomas Aquinas College, Financial Aid Office, 10,000 Ojai Rd., Santa Paula, CA 93060.**

Questions? Contact the Financial Aid Office at (805) 421-5936 or by e-mail at [FinAid@ThomasAquinas.edu](mailto:FinAid@ThomasAquinas.edu).

### B. Student and Family Information

Student's First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Student's Social Security Number or School ID Number \_\_\_\_\_

Student's Street Address (include apt. no.) \_\_\_\_\_ Student's Date of Birth \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Student's Home Phone Number (include area code) \_\_\_\_\_

**List below the people in your parents' household. Include:**

- Yourself and your parent(s) (including a stepparent), even if you do not live with your parents.
- Your parents' other children (even if they do not live with your parents) IF (a) your parents will provide more than half their support from July 1, 2019, through June 30, 2020, or (b) the children would be required to provide parental information if they were completing a FAFSA for 2019-2020. (Typically foster children do not count in household size as their costs are covered by foster care payments.)
- Your parents' unborn child if that child will be born by June 30, 2020 and your parents will provide more than half of the child's support from birth through June 30, 2020. (If there is a medical determination of a multiple birth, then all expected children can be included.)
- Other people if they now live with your parents and your parents 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, 2020.
- **Also provide college information in the last two columns for 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, 2019 and June 30, 2020.**

*If you need more space, attach a separate page with the student's name and SSN or School ID number at the top.*

Full Name <small>(See directions above for who should be included.)</small>	Age	Relationship	College Attending in 2019-20	Will be enrolled in college at least half time? (Yes or No)
<i>John Jones (example)</i>	<i>20</i>	<i>Brother</i>	<i>Central University</i>	<i>Yes</i>
		Self		

## C. Student's Income Information

Check only ONE of the five boxes below and provide the requested information and documents for that item:

- a.  I have used (or will use) the **IRS Data Retrieval Tool** in *FAFSA on the Web* to transfer my 2017 income tax information into the FAFSA.
- b.  I have provided (or will provide) EITHER (1) a **signed copy of my 2017 federal tax return with all schedules and forms** normally sent to the IRS OR (2) a "**Tax Return Transcript**" received from the IRS.
- c.  I have filed an **amended** 2017 IRS income tax return. Attach: (1) a signed copy of your 2017 Form 1040X, "Amended U.S. Individual Income Tax Return" that was filed with the IRS, including any supporting documents and new or changed forms and schedules, and (2) EITHER a signed copy of the 2017 federal tax return you originally filed with the IRS OR a "Tax Return Transcript" received from the IRS.
- d.  I will not file and **am not required** to file a 2017 IRS income tax return and **I was not employed and I had no income earned from work in 2017**. No additional documentation is required.
- e.  I will not file and **am not required** to file a 2017 IRS income tax return, **but I was employed in 2017**. List below the names of all employers, the amount earned from each in 2017 (even if the employer did not issue a W-2), and whether you received a W-2 or an equivalent document. **Attach copies of all 2017 W-2 forms or equivalent documents issued to you**. If more space is needed, attach a separate page with the student's name and SSN or School ID number at the top.

ONLY COMPLETE this table if box "e" above is checked.	Employer's Name	2017 Amount Earned	Have you received an IRS W-2 or equivalent document? (If so, please attach.)
	<i>ABC Company (example)</i>	<i>\$2,132.47(example)</i>	<i>Yes</i>

## D. Parents' Income Information

Check only ONE of the five boxes below and provide the requested information and documents for that item:

(Notify the Financial Aid Office if the parents filed separate IRS income tax returns for 2017 or had a change in marital status after 12-31-2017.)

- a.  Parents have used (or will use) the **IRS Data Retrieval Tool** in *FAFSA on the Web* to transfer 2017 income tax information into the FAFSA.
- b.  Parents have provided (or will provide) EITHER (1) a **signed copy of their 2017 federal tax return with all schedules and forms** normally sent to the IRS OR (2) a "**Tax Return Transcript**" received from the IRS.
- c.  Parents have filed an **amended** 2017 IRS income tax return. Attach: (1) a signed copy of your 2017 Form 1040X, "Amended U.S. Individual Income Tax Return" that was filed with the IRS, including any supporting documents and new or changed forms and schedules, and (2) EITHER a signed copy of the 2017 federal tax return you originally filed with the IRS OR a "Tax Return Transcript" received from the IRS.
- d.  Parents will not file and **are not required** to file a 2017 IRS income tax return and **neither parent was employed and neither parent had any income earned from work in 2017**. Provide a **Verification of Non-filing Letter** for each parent from the IRS. (See the attached instructions for how to obtain a Verification of Non-filing Letter.)
- e.  Parents will not file and **are not required** to file a 2017 IRS income tax return, **but one or both were employed in 2017**. List below the names of all employers, the amount earned from each in 2017 (even if the employer did not issue a W-2), and whether you received a W-2 or an equivalent document. **Provide a Verification of Non-filing Letter** for each parent from the IRS. (See the attached instructions for how to obtain a Verification of Non-filing Letter.) **Attach copies of all 2017 W-2 forms or equivalent documents issued to parents**. If more space is needed, attach a separate page with the student's name and SSN or School ID number at the top.

ONLY COMPLETE this table if box "e" above is checked.	Employer's Name	2017 Amount Earned	Has an IRS W-2 or equivalent document been received? (If so, please attach.)
	<i>ABC Company (example)</i>	<i>\$2,132.47(example)</i>	<i>Yes</i>

## E. Certification

Please print, sign, and return this form (pages 1 and 2) to the Financial Aid Office. See instructions in Section A for where to send.

Each person signing below certifies that all the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student's Signature \_\_\_\_\_

Date \_\_\_\_\_

Parent's Signature (only one parent's signature is needed) \_\_\_\_\_

Date \_\_\_\_\_

**Warning: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**

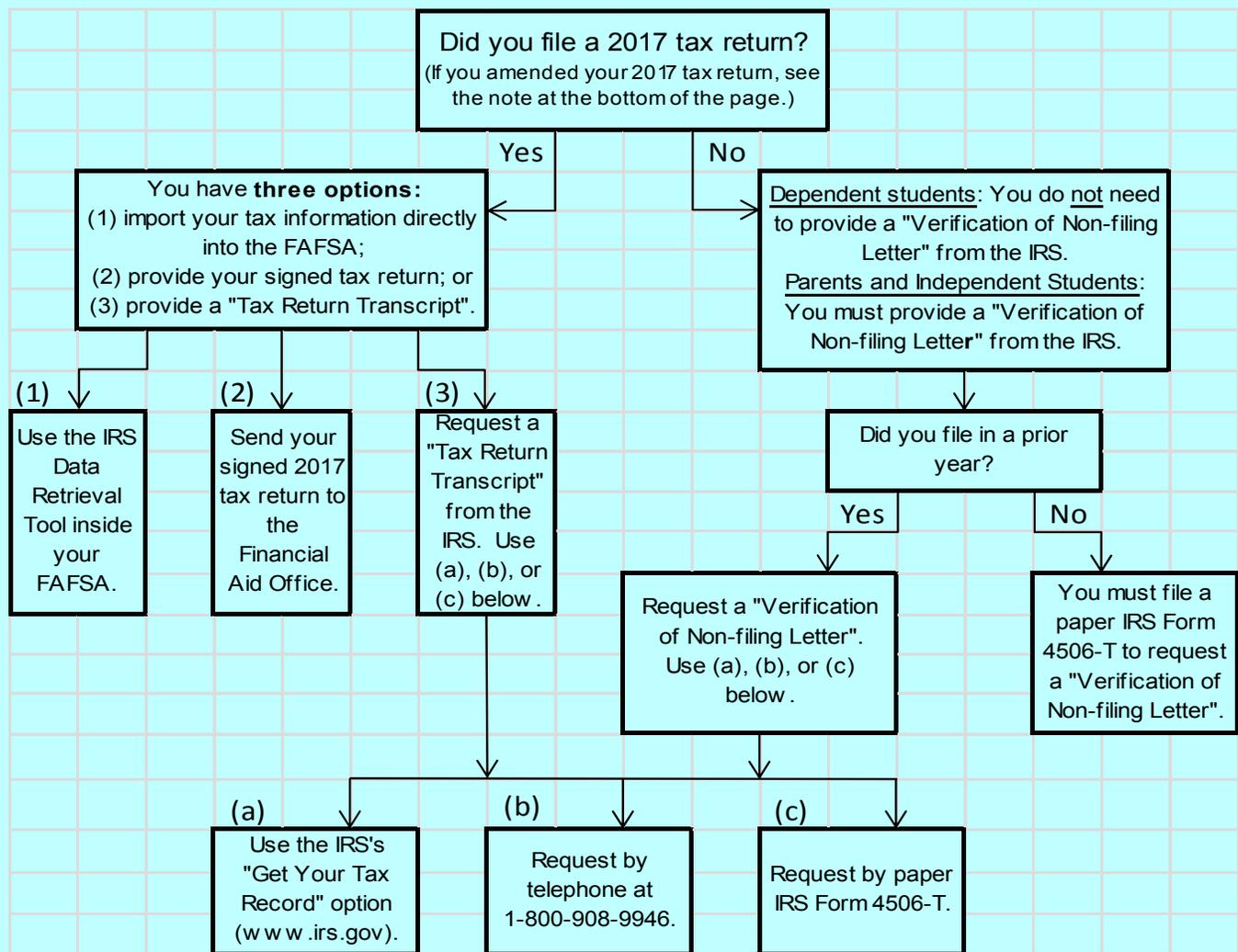


## Verification of Your FAFSA: How to Confirm 2017 Federal Income Tax Data or Non-filing Status

Each year the Department of Education selects approximately one-third of all FAFSAs for “verification” which means the student and his parents are required to complete a supplemental worksheet and provide confirmation of the federal income tax information requested on the FAFSA.

In order for Thomas Aquinas College to verify your FAFSA (and consequently your eligibility for federal student aid), you and your parents must:

- I. Complete a Verification Worksheet and
- II. Confirm parents’ and student’s 2017 federal income tax data and/or non-filing status. See options below:



If you need more information, call the Financial Aid Office at (805) 421-5936. We will be happy to help you!

Note: If you have **amended** your tax return, the IRS Data Retrieval Tool will not show the amended tax data. Instead, you will have to provide the Financial Aid Office with the following documents to confirm your federal income tax data:

- A signed copy of your IRS Form 1040X (“Amended U.S. Individual Income Tax Return”) that was filed with the IRS, including any supporting documents and new or changed forms and schedules;
- A signed copy of the 2017 federal tax return you originally filed with the IRS or a “Tax Return Transcript” received from the IRS.