



Office of Student Financial Planning
1050 Union University Dr.
Jackson, TN 38305
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2021–2022 INDEPENDENT STUDENT VERIFICATION WORKSHEET

Your 2021-22 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 using this worksheet and other required documents. If there are differences, your FAFSA information may need to be corrected. Both you and your spouse, whose information was reported on the FAFSA, must complete and sign this worksheet, attach any required documents, and submit them to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible to avoid any delays to your financial aid.

1. Student Information

Name:	Student ID Number:
Address:	Date of Birth:
City, State, Zip:	Phone Number:
Email:	Alternate Phone Number:

2. Household Information

List the people in your household. Include:

- Yourself
- Your spouse
- Your children, if they will receive more than half of their support from you and/or from July 1, 2021 through June 30, 2022.
- Your unborn child, if that child will be born before June 30, 2022 and you will provide more than half of the child's support from the projected date of birth through June 30, 2022.
- Other people, if they live with and receive more than half of their support from you and/or your spouse at the time of application and will continue to receive more than half of their support from July 1, 2021 through June 30, 2022.

If you need more space, please attach a separate page with your name and ID at the top.

3A. Tax Forms and Income Information

All tax filers must submit a copy of their 2019 IRS Tax Return Transcript *unless* they have transferred their 2019 income tax return information into the FAFSA using the IRS Data Retrieval Tool (IRS DRT) and have not subsequently changed that information. Please **DO NOT** submit copies of your 2019 federal 1040, 1040A, or 1040EZ tax returns, any IRS schedules, or state tax returns

- If either the student and/or spouse **did file** a 2019 federal tax return, that individual should go to **Section 3B***
- If either the student and/or spouse **did not file** a 2019 federal tax return, that individual should go to **Section 3C**.*

3B. Verification of 2019 IRS Income Tax Return Information for Tax Filers

<input type="checkbox"/> The student and/or spouse <u>has used</u> the IRS DRT in <i>FAFSA on the Web</i> to transfer 2019 IRS income tax return information into the student's FAFSA.	<input type="checkbox"/> The student and/or spouse <u>has not yet used</u> the IRS DRT in <i>FAFSA on the Web</i> , but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA once the 2019 IRS income tax return has been filed.
<input type="checkbox"/> The student and/or spouse is <u>unable or chooses not to use</u> the IRS DRT in <i>FAFSA on the Web</i> , and instead will provide the school a 2019 IRS Tax Return Transcript.	

Directions for using the IRS Data Retrieval Tool (IRS DRT) or requesting a Tax Return Transcript

*The IRS DRT is available in the "Financial Information" sections of the student's FAFSA. Go to www.FAFSA.gov and, under Returning User, select "Login." Enter the student's name, SSN, and date of birth and select "Next." Then select "Make FAFSA Corrections." You will need to enter the student's PIN and create a new password before you can access the student's FAFSA. Once you are logged in, "Financial Information" is the fifth tab to the right. You will have the option to use the IRS DRT as long as you (student) or your parent has "Already Completed" an IRS income tax return (select "Already Completed" from the drop down box). You cannot use IRS DRT if you filed your tax return electronically within the past 3 weeks or by paper within the past 11 weeks. Once you use the IRS DRT for the student and/or parent, select the "Sign & Submit" tab. The FAFSA must be signed electronically with the student's and parent's PINs and re-submitted for processing. If you have any trouble with this process, feel free to call the Financial Aid Office for help.

** To obtain a **2019 IRS Tax Return Transcript**, go to www.IRS.gov and click on the "Get Transcript by Mail" link. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2019 IRS income tax return, and the address used on the 2019 IRS income tax return. In most cases, for electronic filers, a 2019 IRS Tax Return Transcript may be requested from the IRS within 2–3 weeks after the 2019 IRS income tax return has been accepted by the IRS. Generally, for filers of 2019 paper IRS income tax returns, the 2019 IRS Tax Return Transcript may be requested within 6–8 weeks after the 2019 paper tax return has been received by the IRS.

3C. Verification of 2019 Income Information for Nontax Filers

If the student was employed in 2019, they must list below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is provided. Provide copies of all 2019 IRS W-2 forms issued to the student by their employers. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and ID number at the top. If a W-2 form is unavailable, attach a statement signed by the student explaining why the W-2 is unavailable and cannot be provided in a timely manner. Student must also provide a Verification of Non-filing letter from the IRS website in addition to 2019 W-2.

Name of Student/Parent	Employer's Name	2019 Amount Earned	IRS W-2 Provided?

4. Verification of 2019 Untaxed Income Information

For the student and spouse, answer each question below. If any item does not apply, enter "N/A" for Not Applicable where a response is requested, and enter 0 in an area where an amount is requested.

4a. Payments to tax-deferred pension and retirement savings

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans [e.g., 401(k) or 403(b) plans], including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.

Name of Person Who Made the Payment	Total Amount Paid in 2019

4b. Child support received

List the actual amount of any child support received in 2019 for the children in your household. **Do not include** foster care payments, adoption payments, or any amount that was court ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child for Whom Support Was Received	Amount of Child Support Received in 2019

4c. Housing, food, and other living allowances paid to members of the military, clergy, and others

Include cash payments and/or the cash value of benefits received. **Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2019

4d. Veteran's non-education benefits

List the total amount of veteran's non-education benefits received in 2019. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

Name of Recipient	Type of Veteran's Non-education Benefit	Amount of Benefit Received in 2019

4e. Money received or paid on the student's behalf

List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2019. Include support from a parent whose information was not reported on the student's 2021–22 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions **unless the person is the student's parent whose information is reported on the FAFSA**. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Name of Recipient	Type of Other Untaxed Income	Amount of Benefit Received in 2019

5. Verification of 2019 Other Untaxed Income Information

For the student and spouse, please list the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability benefits, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

Do not include any items reported or excluded in Section 4 above. In addition, do not include student aid, Earned Income Credits, Additional Child Tax Credits, welfare payments, Temporary Assistance for Needy Families (TANF) benefits, extended foster care benefits, untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, combat pay, on-base military housing or military housing allowance benefits, flexible spending arrangement (e.g., cafeteria plan) benefits, foreign income exclusions, or credits for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Amount Received

6. Supplemental Nutrition Assistance Program (SNAP) Benefits

Did anyone listed in **Section 2** receive SNAP benefits in 2019 or 2020?

No. No one in the household received SNAP benefits in 2019 or 2020.

Yes. A member of the household received SNAP benefits in 2019 or 2020.

Names of Household Members who received benefits:

7. Child Support Paid

Child support you and your spouse paid because of divorce or separation or as a result of a legal requirement. Don't include child support you or your spouse paid for children living in your household

Total amount of child support paid during 2019	\$	
Name of the person to whom child support was paid:		
Names and ages of the child (children) for whom the child support was paid:	Child Name:	Age:

8. Student's High School Completion Status

Provide one of the following documents indicating the student's high school completion status when the student will begin college in 2021-22. Check the box of the document you will attach to this worksheet.

- Office of Admissions has this documentation on file (no attachment necessary)
- High school diploma
- Final official high school transcript including graduation date when diploma was awarded
- Copy of the "secondary school leaving certificate" (or other similar document) for students who completed secondary education in a foreign country and are unable to obtain a copy of their high school diploma or transcript
- General Educational Development (GED) certificate or GED transcript
- State certificate or test transcript received after the student has passed a state-authorized examination the state recognizes as the equivalent of a high school diploma [e.g., High School Equivalency Test (HiSET), etc.]
- Academic transcript of a successfully completed two-year program acceptable for full credit toward a bachelor's degree
- If state law requires a homeschooled student to obtain a secondary school completion credential (other than a high school diploma or its recognized equivalent), a copy of that credential
- If state law does not require a homeschooled student to obtain a secondary school completion credential, a transcript or the equivalent signed by your parent or guardian, that lists the secondary school courses completed and documents the successful completion of a secondary school education in a home school setting
- DD Form 214, Certificate of Discharge from Active Duty, if it indicates student has a high school diploma or its equivalent

If you are unable to obtain any of the documentation listed above, you must contact our office.

9. Certification

By signing this worksheet, each person certifies that all the information reported on this form is complete and correct.

Student's Signature: _____ Date: _____

Student's Printed Name: _____

For Student Financial Planning Use Only

Date Requested: _____

Date Complete File Received: _____

Verification Type: _____

Verification completed on: _____

Signed: _____