

CARLOW UNIVERSITY

2020-21 Standard Verification Worksheet

Your student aid application was selected for review by the U.S. Department of Education. Carlow University is required by federal law to compare your application with information on this worksheet and with your 2018 federal tax documents. This includes spouse's information if married and parents' information if you are considered dependent for federal aid purposes.

Once complete, necessary corrections will be submitted to the Central Processing System and you will receive an amended Student Aid Report (SAR) including required adjustments to your Expected Family Contribution (EFC).

Your financial aid package is not finalized until verification is complete so it is important to submit all documentation as soon as possible!

A. Student Information

| | | | | |
|------------------------------------|------------|-------|---------------|------------|
| _____ | _____ | _____ | _____ | _____ |
| Last Name | First Name | MI | Date of Birth | Student ID |
| _____ | | | _____ | |
| Address (include apartment number) | | | Email Address | |
| _____ | _____ | _____ | _____ | |
| City | State | Zip | Phone Number | |

B. Family Information

List the name and age of all household members (as defined below). Also include the name of the college for household members, excluding your parent(s), who will be enrolled, at least half time, in a degree, diploma, or certificate program at a post-secondary educational institution any time between July 1, 2020 and June 30, 2021.

Dependent Student

- Yourself
- Your parent(s), including step-parent (if applicable). Do not include your non-custodial parent.
- Your parent(s)' other dependent children if your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021.
- Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021.

Independent Student

- Yourself
- Your spouse (if applicable)
- Your children, if you will provide more than half of their support from July 1, 2020 through June 30, 2021.
- Other people only if they now live with you and you will provide more than half of their support from July 1, 2020 through June 30, 2021.

| Full Name | Age | Relationship to Student | Attending College | Name of the College If enrolled at least half-time during 2020-21. |
|-----------|-----|-------------------------|--|---|
| | | Self | <input type="checkbox"/> Yes <input type="checkbox"/> No | Carlow University |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | |

C. Tax Status and Requirements: Student/Spouse- Check applicable boxes:

- (1) The student and/or spouse filed a 2018 federal income tax return and used the IRS Data Retrieval Tool for FAFSA on the Web to transfer 2018 IRS income information to the student’s FAFSA.
- (2) The student and/or spouse filed a 2018 federal income tax return but did not or could not use the IRS Data Retrieval Tool for FAFSA on the Web. **You must attach a signed copy of the 2018 federal tax return or the IRS Tax Return Transcript.**
- (3) The student and/or spouse worked in 2018 but did not file and were not required to file a 2018 federal tax return. **Attach copies of W2 forms and complete the following box. Continue to complete (5).**

| Name | Employer Name | Amount Earned in 2018 |
|------|---------------|-----------------------|
| | | |
| | | |
| | | |

- (4) The student and/or spouse had no taxable income from work and did not file and were not required to file a 2018 federal tax return. **Continue to complete (5).**
- (5) I certify that I/We did not file and were not required to file a 2018 federal income tax return and that attempts to obtain a Verification of Non-Filer Form from the IRS were unsuccessful. The non-filer is student spouse Both

D. Tax Status and Requirements: Parent- if Dependent- Check applicable boxes:

- (1) Parent(s) filed a 2018 federal income tax return and used the IRS Data Retrieval Tool for FAFSA on the Web to transfer 2018 IRS income information to the student’s FAFSA.
- (2) Parent(s) filed a 2018 federal income tax return but did not or could not use the IRS Data Retrieval Tool for FAFSA on the Web. **Attach a signed copy of the parents' 2018 federal tax return or the IRS Tax Return Transcript.**
- (3) Parent(s) worked in 2018 but did not file and were not required to file a 2018 federal tax return. **Attach copies of W2 forms and complete the following box. Continue to complete (5).**

| Name | Employer Name | Amount Earned in 2018 |
|------|---------------|-----------------------|
| | | |
| | | |
| | | |

- (4) Parent(s) had no taxable income from work and did not file and were not required to file a 2018 federal tax return. **Continue to complete (5).**
- (5) I certify that I/We did not file and were not required to file a 2018 federal income tax return and that attempts to obtain a Verification of Non-Filer Form from the IRS were unsuccessful. The non-filer is Parent 1 Parent 2 Both Parents

E. Sign and Date this Worksheet

I/we certify that all information reported on this form is complete and correct. I/we understand that changes in my FAFSA information based on the documentation provided may result in a change in financial aid eligibility.

Please note: Signatures must be handwritten (ink signatures). Electronic signatures, either typed or with a stylus, are not acceptable.

Student Date
Ink signature is required. E-signature is not acceptable.

Parent (Required for dependent students) Date
Ink signature is required. E-signature is not acceptable.

F. Submit this Form and ALL REQUIRED DOCUMENTS to:

Carlow University
Office of Financial Aid
3333 Fifth Avenue
Pittsburgh, PA 15213

EMAIL: finaid@carlow.edu
FAX: 412-578-6689

Instructions for Obtaining Tax Documents

FAFSA IRS Data Retrieval Tool

★ Recommended ★

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to www.fafsa.gov and select Login.
- Select “Make FAFSA Corrections”
- Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



IMPORTANT: If you successfully used the Data Retrieval Tool you do not need to submit a Tax Return or Tax Return Transcript

Options for Getting Your IRS Tax Return Transcript if available

Online Request

- Go to www.IRS.gov
- On the IRS homepage select "Get Your Tax Record."
- Select “Get Transcript ONLINE” or “Get Transcript by MAIL.”
- Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”

Telephone Request - 1-800-908-9946

Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

Options for Getting Your IRS Verification of Non-Filing if available

Online Request

- Go to www.IRS.gov
- On the IRS homepage select "Get Your Tax Record."
- Select “Get Transcript ONLINE” or “Get Transcript by MAIL.”
- Request "Verification of Non-Filing"

Paper Request Form - IRS Form 4506-T

Tax Filers with Special Circumstances

Individuals Who Filed an Amended IRS Income Tax Return - Provide a copy of the IRS tax return transcript **and** a signed copy of the IRS Form 1040X.

Individuals Who Were Victims of Tax Administration Identity Theft - Call the IRS at 1-800-908-4490 and complete Financial Aid Form 1e.

Individuals Who Filed Non-US Income Tax Returns - Provide a signed copy of that income tax return(s); **or** a transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer’s income and tax information required to be verified for the tax year.

Divorced/Separated students or parents who filed Married Filing Jointly must also attach W2 Forms.

Married students or parents must also submit spouse's tax return even if not married in 2018.