

## **2020-21 Verification Worksheet**



Your 2020–21 Free Application for Federal Student Aid (FAFSA) was selected by the federal processor for review in a process called verification. The law says that before providing federal student aid, we must ask you to confirm some of the information you reported on your FAFSA. To verify the information you provided, please complete the questions below, include signatures, and mail, bring, or fax the form to the Financial Assistance Office within 2 weeks of your receipt of this letter. Failure to respond will result in our inability to disburse Federal Aid. If corrections need to be made to your FAFSA, the Financial Assistance Office will submit the changes on your behalf and will notify you of any changes by mail or email.

### A. Student Information

			XXX-XX-
Student's Last Name	Student's First Name	Student's M.I.	Last 4 digits of student's SSN
Student's Street Address (in	Student's Email Address		
			( )
City	State	Zip Code	Student's Phone Number

### B. Family Information

### Include:

- Yourself
- Your spouse
- Also include your dependent children (IF you will provide more than half their support from July 1, 2020 through June 30, 2021, or the children would be required to provide parental information when applying for Federal Student Aid).

Include other people as part of your family only if:

 They lived with you and received more than half their support from you at the time you completed your FAFSA

#### AND

 They will continue to receive more than half their support from you from July 1, 2020 through June 30, 2021.

Full Name	Age	Relationship	Name of college	Enrolled at least half time, yes or no
		Self	Meredith College	yes

Of those listed above, write in the name of the college for any family member who will be enrolled at least half-time in a degree or certificate program between July 1, 2020 and June 30, 2021. Note: If you need more space, attach a separate page.

## C. Verifying Taxable Income

You can use <u>EITHER</u> the IRS Data Retrieval Tool through your FAFSA, <u>or</u> you can submit a <u>SIGNED</u> copy of your complete <u>2018</u> federal tax return. Since the information we are requesting is from <u>2018</u>, your tax information should be readily available. (If you have not yet filed your <u>2018</u> federal tax return, please contact the Office of Financial Assistance). We have provided some helpful information below about using the IRS Data Retrieval Tool. It is easy and straightforward to use, but if you are not successful with it, please submit a <u>SIGNED</u> copy of the complete <u>2018</u> federal tax return. (It is also acceptable to submit a 2018 tax return transcript if you have already requested one from the IRS).

### **IRS Data Retrieval Tool:**

Go to fafsa.ed.gov and indicate that you want to make a correction to your FAFSA. Navigate to the "Income" section. If you check that the tax return is already completed, the FAFSA will prompt you about using the IRS Data Retrieval Tool. You will not be able to use the Tool if:

- You filed Married Filing Separately
- You filed a non-U.S. tax return

FAFSA will link you to the IRS web site. You will need the Social Security number of the FIRST person listed on the tax return. Follow the directions. After the tax information is transferred back to your FAFSA, **remember to hit save and submit so we will receive your new FAFSA.** 

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# **Student/Spouse Tax/Income Information:** Please check the box that applies: ☐ I/we did file a 2018 federal tax return and have used the IRS Data Retrieval Tool to retrieve and transfer 2018 IRS income information into the 2020-21 FAFSA. (Directions for using the IRS Data Retrieval Tool are above). ☐ I/we did file a 2018 federal tax return and will submit a SIGNED copy of the complete 2018 federal tax return to the Office of Financial Assistance at Meredith College. I/we did not file and were not required to file a 2018 federal tax return. You will need to request a 'Verification of Nonfiling' from the IRS. Please download and complete IRS form 4506T from our website, www.meredith.edu/financialassistance. Check #7, use the year 12/31/2018 in #9, sign and mail it to the address indicated on the form. IF YOU DID NOT FILE A TAX RETURN, PLEASE ALSO COMPLETE: o I/we were not employed and had no income earned from work in 2018. ○ I/we were employed in **2018** and earned a total from work of \$\_ . Complete the chart below listing all employers, the amount earned from each employer in 2018, and attach all W-2(s). Employer's Name W-2 Attached? If not available, please explain Amount Earned in 2018 why and provide alternate documentation. D. Certification and Signatures By signing below, I/we certify that all of the information reported on this verification worksheet is complete and correct. WARNING: If you purposely give false or misleading information on this worksheet, you may be fined and/or sentenced to jail. **Student Signature** Date **Spouse Signature** Date

Mail, fax, or bring this form and accompanying documentation to:
Meredith College, Attn: Office of Financial Assistance
3800 Hillsborough St. Raleigh, NC 27607
Fax: (919) 760-2373 Office: (919) 760-8565