

2019-2020 Independent Verification Worksheet

Your 2019-2020 FAFSA has been selected for a process called verification by the Department of Education. This process compares your FAFSA information to your tax information to provide you with an accurate award letter. Any corrections that need to be made will be done electronically by our office. If any corrections are made, you will receive an email from the Department of Education with the corrections listed on your Student Aid Report (SAR).

*You will not receive your financial aid until this process is complete.

Checklist to avoid processing delays:

- Submit all documentation **together as soon as possible** or try to meet the **September 30** priority deadline.
- Print your name and HU student ID number on each document.
- Monitor your document requirements and financial aid status on BisonWeb.

Documents to turn in:

- Verification worksheet signed by you and one parent/guardian
- Student IRS Tax Return Transcripts or W2s
- Spouse Tax Return Transcripts or W2s

Tax Return Transcripts and Verification of Non-Filing (for parents and independent students) must be requested from the IRS either online at www.irs.gov or by calling 1 (800) 908-9946. For approved tax extensions, you must provide Form 4868 in lieu of the transcripts.

If eligible, we encourage you to use the Data Retrieval Tool (DRT) on the tax portion of your FAFSA for both students and parents. This will allow you to link your taxes directly to your FAFSA information.

*****FRAUD NOTICE*****

Should our review of your financial aid application reveal you may have engaged in fraud or other criminal misconduct regarding your application, we are required to report information to the Office of the Inspector General of the U.S. Department of Education for investigation. Examples of such information include (but are not limited to) false claims of independent student status, false claims of citizenship, use of false identities, forgery of signatures or certificates, and false statements of income.

Table 1-1. 2017 Filing Requirements for Most Taxpayers

IF your filing status is...	AND at the end of 2017 you were...*	THEN file a return if your gross income was at least...**
Single	under 65	\$10,400
	65 or older	\$11,950
Married filing jointly***	under 65 (both spouses)	\$20,800
	65 or older (one spouse)	\$22,050
	65 or older (both spouses)	\$23,300
Married filing separately	any age	\$ 4,050
Head of household	under 65	\$13,400
	65 or older	\$14,950
Qualifying widow(er)	under 65	\$16,750
	65 or older	\$18,000

For Office Use Only:

Received by: _____

Date: _____

Approved

Denied

Pending

FAA Initials: _____

Date: _____

2019-2020 Dependent Verification Worksheet

Last Name	First Name	HU ID Number
Email Address	Contact Number	

Section 1: Household Information

List the people in your parent's household, include the following:

- Yourself and your spouse (if applicable);
- Your children, if you **provide more than half** of their support from July 1, 2019 through June 30, 2020 even if they do not live with you; and
- Other people, if they now live with you and you **provide more than half** of their support and will continue to **provide more than half** of their support from July 1, 2019 through June 30, 2020.

Write the **names of all household members** and the **name of the college** for any household member (except your parents) who will be attending college at least half-time between July 1, 2019 and June 30, 2020. If you need more space, attach a separate page.

Full Name	Date of Birth	Relationship (to student)	College (if enrolled at least ½ time – excluding parent(s))
<i>EXAMPLE – Missy Jones</i>	<i>05/25/2005</i>	<i>Sister</i>	<i>University of Pennsylvania</i>
		Self	Howard University
		Spouse	
		Child	

Section 2: Student's Tax Forms and Income Information (all applicants)

Answer the following questions regarding your tax filing information:

1. Did you work and earn wages at any time in 2017?

Yes – continue to next question
 No – continue to Section 3

2. Did you file a tax return in 2017? **NOTE:** As a dependent, you are required to file a Federal Income Tax Return if your unearned income exceeds \$1,050 or your earned income exceeds \$6,300.

Yes – continue to next question
 No – attach W2s to the verification form

3. Did you link your taxes, using the Data Retrieval Tool (DRT), when you completed your FAFSA?

Yes – continue to section additional info section
 No – continue to next question

4. Did you request a copy of your Tax Return Transcript from the IRS? **NOTE:** Tax transcripts may be requested from the IRS by filing the Form 4506-T available online www.irs.gov, or via telephone 1-800-908-9946.

Yes – attach the Tax Return Transcript to the verification worksheet and continue to Section 3

For Office Use Only:	
Received by: _____	Date: _____
<input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Pending	FAA Initials: _____ Date: _____

Section 3: Spouse's Tax Forms and Income Information

Answer the following questions regarding your tax filing information:

1. Did you work and earn wages at any time in 2017?
 - Yes – continue to next question
 - No – attach IRS Verification of Non-Filing and continue to Section 4

2. Did you and your spouse file separately?
 - Yes – attach your spouse's tax return transcript
 - No – continue to Section 4

Section 4: Additional Financial Information for Students and Spouse

****Do not leave boxes blank, if something does not apply write 0.**

Student – 2017 Amount	Source of Untaxed Income	Spouse – 2017 Amount
	Child Support Paid	
	Food Stamps Received	
	Workman's Compensation	
	Education Credits	
	Pension/IRA Rollover or Distribution **Attach 1099-R	
	Additional Financial Support	
Student – As of Today Amount	Assets and Investments	Spouse – As of Today Amount
	Checking and Savings	
	Business Net Worth	
	Farm Net Worth	
	Investments (excluding primary residence)	

Section 5: Certification

By signing this worksheet, we certify that we have read through **ALL** information and **ALL** instructions on this form and have followed them to the best of our ability. We further certify that all information reported on this worksheet is complete and correct and understand that verification will not be processed if any section has been left blank. **Signing for someone else is fraud, even with their permission.** Electronic signatures are not accepted.

Student's Signature

Date

Spouse's Signature (if applicable)

Date

For Office Use Only:	
Received by: _____	Date: _____
<input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Pending FAA Initials: _____ Date: _____	