

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your FAFSA application with copies of your and your spouse's (if applicable) 2018 federal tax return transcripts, or other financial documents. The law states we have the right to ask you for this information before awarding federal aid. If there are differences between your FAFSA application information and your financial documents, you or your school may need to make corrections electronically, or by using your Student Aid Report (SAR).

1. Submit the completed 2020-2021 Independent Verification Worksheet. Make sure the form is **signed by the student and spouse (if applicable)**.
2. If the number in the household and/or college you are reporting on the Verification Worksheet does not match the number(s) you reported on the FAFSA, submit a written explanation of the discrepancy which must be **signed by the student and spouse (if applicable)**.
3. If requested, submit **2018 Federal Tax Return Transcript(s), or a signed copy of the 2018 tax form 1040**, for both student and spouse, if filed. **You can obtain a Federal Tax Return Transcript by calling the IRS at 1-800-908-9946 or at [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript).**
4. **If filed**, the following schedules and forms may be requested from your tax return:
  - **Schedule 1** (Additional Taxes and Adjustments to Income), **Schedule 2** (Additional Tax), **Schedule 3** (Nonrefundable Credits), **Schedule 4** (Other Taxes), and/or **Schedule 5** (Other Payments and Refundable Credits)
  - **Schedule C** (business income)
  - **Schedule E** (property rental, royalties, S corps, trusts, etc.)
  - **1099 R** (distributions from IRS, pensions, annuities, etc.)
  - **Signed 1040X** if taxes were amended

**A. Student Information**

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YSU Banner ID	Last Name	First Name	M.I.
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Street Address

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City	State	Zip Code
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Date of Birth	Phone Number
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## B. Family Information

1. List the people in your household, including:

- yourself and your spouse, if you have one, and
- your children, if you will provide more than half of their financial support from July 1, 2020 through June 30, 2021, even if they do not live with you, and
- other people if they now live with you, and you now provide more than half of their financial support and will continue to provide more than half of their support from July 1, 2020 through June 30, 2021.

Additionally, write in the name of the college for any household member(s) who will be attending at least half-time between July 1, 2020 and June 30, 2021, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		Self	YSU

## C. Student's Filing Status, Tax Form, and Income Information

1. Check only one box below:

- I completed a 2018 federal tax return. *Select one option below:*
- I used the IRS Data Retrieval Tool on the FAFSA. Date used: \_\_\_\_\_
  - I will submit a copy of my 2018 Federal Tax Return Transcript. Please see page 4 of this document for instructions on obtaining a Tax Return Transcript.
- I did not work in 2018. I did not and will not file a 2018 federal tax return. *You must also submit the following:*
- An IRS Verification of Non-filing Letter.  
Please see page 4 of this document for instructions on obtaining the Non-filing Letter.
  - A written explanation of how you financially met your basic living expenses in 2018.
- I worked in 2018, but I did not file a 2018 federal tax return. *You must also submit the following:*
- A copy of the W-2(s) for each source of employment.
  - An IRS Verification of Non-filing Letter. Please see page 4 of this document for instructions on obtaining the Non-filing Letter.
  - List below all employers and the amounts earned in 2018:

**ONLY COMPLETE IF YOU MADE WAGES, BUT WERE NOT REQUIRED TO FILE TAXES**

Employer Name	2018 Earnings

## D. Spouse's Filing Status, Tax Form, and Income Information

1. Check only one box below:

- Spouse filed their 2018 federal tax return jointly with student.
- If filed separately, the spouse completed a 2018 federal tax return. *Select one option below:*
- They used the IRS Data Retrieval Tool on the FAFSA. Date used: \_\_\_\_\_
- They will submit a copy of their 2018 Federal Tax Return Transcript. Please see page 4 of this document for instructions on obtaining a Tax Return Transcript.
- Spouse did not work in 2018. They did not and will not file a 2018 federal tax return. *You must also submit the following:*

**-An IRS Verification of Non-filing Letter. Please see page 4 of this document for instructions on obtaining the Non-filing Letter.**

**-A copy of the W-2(s) for each source of employment.**

- The spouse worked in 2018, but was not required to file a 2018 federal tax return. *You must also submit the following:*

**-An IRS Verification of Non-filing Letter for spouse.**

**Please see page 4 of this document for instructions on obtaining the Non-filing Letter.**

**-List below all employers and the amount your spouse earned in 2018:**

**ONLY COMPLETE IF YOU MADE WAGES, BUT WERE NOT REQUIRED TO FILE TAXES**

Employer Name	2018 Earnings

Untaxed Income Information	Student/Spouse
Untaxed portions of Individual Retirement Account (IRA) distributions and untaxed portions of pension (from IRS Form 1040-lines 4a minus 4b). Exclude rollovers. If negative, enter a zero here.	\$  <input type="checkbox"/> Rollover

## Sign Worksheet

Each person signing the verification worksheet is certifying that all information reported is complete and correct. The student and spouse must sign and date.

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse Date

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

## IMPORTANT DOCUMENT INFORMATION

### **IRS Tax Return Transcript**

If you did not originally use the IRS Data Retrieval Tool when you filed the FAFSA, you may submit a correction at [www.fafsa.gov](http://www.fafsa.gov) and use the tool instead of submitting an IRS Federal Tax Return Transcript. Some tax filers may not be able to use the IRS Data Retrieval Tool. If that applies to you, submit the IRS Tax Return Transcript, or a signed copy of the 2018 tax form 1040.

A Federal IRS Tax Return Transcript can be obtained online or by mail, free of charge, by visiting [www.irs.gov](http://www.irs.gov) (click on “Get My Tax Record”), or by calling **1-800-908-9946**. Be sure to request a “**Return Transcript**” and **NOT** an “**Account Transcript**.” *Federal financial aid policies do not allow us to accept a copy of your federal tax return or state tax return.*

If you filed an amended tax return for 2018, you must provide a copy of your tax transcript, or a signed copy of the tax form 1040 (which will include only information from the original tax return), AND a signed copy of the 2018 IRS form 1040X that was filed with the IRS.

If you were a victim of IRS tax-related identity theft and cannot obtain an IRS Tax Return Transcript, you can instead provide a Tax Return DataBase View (TRDBV) Transcript and a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft. You must contact the IRS at **1-800-904-4490** to request a TRDBV Transcript.

### **IRS Verification of Non-Filing Letter**

An IRS Verification of Non-Filing Letter can be obtained online or by mail, free of charge, by visiting [www.irs.gov](http://www.irs.gov) (click on “Get My Tax Record”), or by calling **1-800-908-9946**. To obtain an IRS Verification of Non-filing Letter, individuals must complete the process for requesting a tax transcript as listed above. The Tax Return Transcript must be requested on or after October 1, 2019. The IRS will provide a non-filing letter only if a return was not filed.

A Verification of Non-filing Letter can also be obtained by completing and faxing an IRS Form 4506-T. For Verification of Non-filing Letters, be sure to check box 7, and on line 9, enter the year or period requested (ex.: 12/31/2018).

## WHAT HAPPENS NEXT

1. A financial aid professional will compare information on this worksheet, and any required supporting documents, with the information submitted on the 2020-2021 FAFSA. Please allow up to 7-10 business days for this review. Please note, expect extended wait times for the verification review process to be complete during our peak processing period (July-September).
2. If additional documentation is requested after reviewing the worksheets and supporting documents, we will request the additional information via the student’s YSU email. It is the responsibility of the student to check their email on a regular basis.
3. Youngstown State University will electronically submit any corrections necessary to the 2020-2021 FAFSA (if required).
4. The Federal Department of Education will reprocess the FAFSA if corrections are submitted and necessary. The student will receive an updated electronic Student Aid Report.
5. If the student’s financial aid eligibility changes for 2020-2021 as a result of corrections, the financial aid awards will be updated on the student’s YSU portal online.