

# 2020-2021 INDEPENDENT STUDENT 2018 IRS INCOME TAX VERIFICATION



Student Administrative  
Services | Financial Aid

DIVISION OF STUDENT AFFAIRS

Student's Name \_\_\_\_\_

Student's ID/ Social Security Number \_\_\_\_\_

Your application was selected for review in a process called "Verification." Our office is required to collect information and documentation to verify the information provided on your FAFSA is true and correct. Please complete this verification worksheet with student **and** spouse (if applicable) signatures and submit to our office. We may need to request additional documentation during the review before your eligibility for financial aid can be determined.

Note: If there are discrepancies between your FAFSA information and the federal tax return transcripts, we may submit corrections to the Federal Processor on your behalf.

## SECTION A: STUDENT TAX FILING STATUS AND INCOME INFORMATION

What is your 2018 tax filing status? You must check one of the boxes below.

- I have filed a 2018 federal tax return.** Skip to section B, then read Section C and follow directions to provide your confirmed tax data from options C1-C3.
- I did not file and was not required to file a 2018 federal tax return.** If you had earnings, complete the income table below and submit all supporting W-2 or other earnings statements with this form. **Read and complete Section C-4 below.**

Employer (Attach additional page if needed)	2018 Earnings - attach all supporting W-2s or 1099 Misc
	\$
	\$

## SECTION B: SPOUSE TAX FILING STATUS AND INCOME INFORMATION

What is your 2018 tax filing status? You must check one of the boxes below.

- I have filed a 2018 federal tax return.** Read Section C and follow directions to provide your confirmed tax data from options C1-C3.
- I did not file and was not required to file a 2018 federal tax return.** If you had earnings, complete the income table below and submit all supporting W-2 or other earnings statements with this form. **Read and complete Section C-4 below.**

Employer (Attach additional page if needed)	2018 Earnings - attach all supporting W-2s or 1099 Misc
	\$
	\$

## SECTION C: HOW TO PROVIDE TAX DATA TO THE FINANCIAL AID OFFICE

**Exceptions made for Unusual Circumstances can be found online at [www.LIFE.edu/FinancialAid/Forms](http://www.LIFE.edu/FinancialAid/Forms).**

Use one of the following methods below to provide your 2018 tax information to the Financial Aid Office:

- 1. IRS Data Retrieval Tool:** If you and/or your spouse have already used the IRS Data Retrieval Tool to transfer tax information onto your FAFSA, complete the signature section below - no tax documentation is required for you to submit to our office at this time.
- 2. Transfer tax information onto your FAFSA:** Go to [www.FAFSA.gov](http://www.FAFSA.gov), log in to the student's processed 2020-2021 FAFSA, select make "FAFSA Corrections," click on the "Financial Information" tab in the top navigation menu. Answer the questions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2018 IRS tax information onto the FAFSA. You will be asked to input your tax filing status and address to verify your identity. After the tax information is transferred make sure to re-submit the FAFSA. The updated FAFSA should be received by the Financial Aid Office within 3-4 business days.
- 3. Submit a signed and dated copy of your 2018 Federal Tax Return OR a 2018 Tax Return Transcript:** Transcripts can be requested online at [www.IRS.gov](http://www.IRS.gov). Click "Get Your Tax Record" and choose "Get Transcript Online" or "Get Transcript by Mail". Make sure you request "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript". You can also call IRS at 800-908-9946 to obtain a tax transcript. For a paper request, complete IRS Form 4506-T or 4506T-EZ. PLEASE NOTE: The IRS will redact much of your personal information from the transcript. Be sure to list the student's full name and Life ID# on the page. Include parent/spouse name if applicable.
- 4. Request a Verification of Non-Filing Letter from the IRS:** Required for any student and/or spouse who did not file a tax return in 2018. Verification letters can be requested online at [www.IRS.gov/individuals/get-transcript](http://www.IRS.gov/individuals/get-transcript), or by mail using Form 4506-T and checking box 7.

Each person signing below certifies that all the information reported is complete and correct. The student and spouse whose information was reported on the FAFSA must sign and date. WARNING: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both.

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_