What is Verification and why was I selected?

You are not alone! Many of the students enrolled at Wingate are selected for verification and are required to submit additional documents in order to ensure the accuracy of FAFSA data.

What do I have to submit?

You should have received an email from the Financial Planning Office with a list of documents that should be submitted along with this verification worksheet. You can also view a list of outstanding documents in your Net Partner account.

What happens if I do not complete verification?

If a student who is selected for verification does not complete the verification process, then any Federal and/or State funding will not be awarded. (This includes, but is not limited to: Federal Direct student loan funding, Federal grant funds, and NC State grant funds.)

Students who do not wish to complete the verification process must submit a signed statement to the Financial Planning Office so any verification related documents can be waived.

What if I did not and will not file a Federal Income Tax Return for 2020?

Dependent Students – Any parent whose income falls below the minimum filing threshold for a given tax year will be required to submit a Verification of Non-Filing Letter from the IRS.

Independent Students – Any student or spouse (if applicable) whose income falls below the minimum filing threshold for a given tax year will be required to submit a Verification of Non-Filing Letter from the IRS.

What is the IRS Data Retrieval Tool (IRS DRT) and how do I use it?

IRS Data Retrieval allows you to electronically transfer federal tax return information directly into your online FAFSA form.

- Log in to your current FAFSA;
- In the finances section you will see a "Link to IRS" button if you are eligible to use the IRS DRT.
- · Click the "Link to IRS" button to be transferred to the IRS to retrieve your info.
- · On the IRS site, enter your information exactly as it appears on your federal tax return and click "submit".
- Check the "Transfer My Tax Information into the FAFSA form" box, and click the "Transfer Now" button.
- You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form.
- For your protection, your tax information will not be displayed on either the IRS site or the FAFSA site.

Are there certain individuals who should not use the DRT?

- · Any tax filer whose marital status has changed from the time s/he has filed the FAFSA to present.
- Biological/adoptive parents of a dependent student who are unmarried, but live together.
- · Any filer who has completed an amended tax return.
- Filers who have completed a Puerto Rican or foreign tax return.
- Married tax filers who...
 - file Married-Separately
 - file Head of Household

Please be sure your First Name, Last Name, and Wingate University Student ID is written on each document!

VERIFICATION FAQ'S CONTINUED

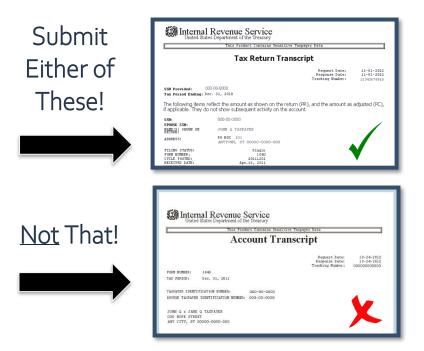
What should I submit if I have been asked to provide a copy of my Tax Return Transcript or Federal Tax Return?

You should provide a copy of either the 2020 IRS Tax Return Transcript or your *signed* 2020 Federal Tax Return. If you elect to submit your Federal Tax Return, you will need to submit all applicable schedules. Applicable schedules include Schedule 1, Schedule 2 and/or Schedule 3. Please be sure to submit all schedules that contain data to our office for review.

You can request a 2020 IRS Tax Return Transcript directly from the IRS using the following methods:

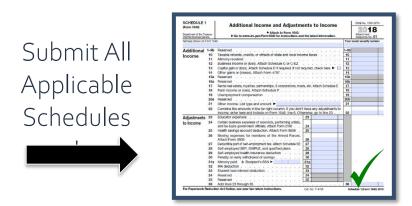
- To view and print your transcripts online, go to IRS.gov and use the Get Transcript tool.
- To order by phone, call 800-908-9946 and follow the prompts.
- To request an individual tax return transcript by mail or fax, complete Form 4506T-EZ.

Do not list Wingate as a third-party recipient when requesting your tax return transcript. You should have the IRS send the document directly to you and then submit a copy to our office.



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What should I submit for my Schedule 1, Schedule 2, or Schedule 3?



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2022-2023 VERIFICATION WORKSHEET

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected by the Department of Education for review. This process compares data from your FAFSA with this form and any other requested information for both and

your spouse/parent(s). We will not be able to finalize your financial aid package until all requested verification documents have been received. Be sure to check your Net Partner account for a list of documents that must be submitted to our office.



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A. STUDENT INFORMATION

Last Name F

First Name

Middle Initial

Student ID Number

B. FAMILY INFORMATION

Please select your status below:

Dependent Students (D)	Independent Students (I)		
 List the people in your parents' household; include: a) yourself and your parent(s) (including stepparent) even if you don't live with your parents b) your parents' other children, even if they don't live with your parent(s), if (1) your parents provide more than half of their support from July 1, 2022 to June 30, 2023, or (2) they would have to provide parental information when applying for aid c) other people if they now live with your parent(s), if your parent(s) provide more than half of their support and will continue to do so from July 1, 2022 through June 30, 2023 	 List the people in your household; include: a) yourself and your spouse b) your children, if you will provide more than half of their support from July 1, 2022 through June 30, 2023 c) any other people if they now live with you, and you provide more than half of their support and will continue to do so from July 1, 2022 through June 30, 2023 		

Write the names of all household members, including yourself:

Full Name	Date of Birth	Relationship	College/University* (See Details Below)	Enrolled at least ½ Time
		Self	Wingate University	Yes

<u>College/University Explained:</u> Include the name of the college/university for any household member, excluding your parent(s), who will be enrolled <u>at least half time</u> in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2022, and June 30, 2023.

C. 2020 INCOME TAX INFORMATION

Please check the box below that applies to you and your:

Parents, if Dependent Student selected on Page 1 <u>or</u> Spouse (if applicable), if Independent Student selected on Page 1

Student ID Number: P

See page one for a complete definition of Dependent/Independent status.

Student			Parent(s) / Spouse			
I filed/will file a 2020 Federal Tax Return			□ I filed/will file a 2020 Federal Tax Return			
You must select one of the following:			You must select one of the following:			
	I imported my tax information using th DRT on the 2022-2023 FAFSA.	he IRS		I imported my tax information DRT on the 2022-2023 FAFS		
	I am submitting a copy of the 2020 IR Return Transcript.	RS Tax		I am submitting a copy of the Return Transcript.	e 2020 IRS Tax	
	l am submitting a copy of the 2020 Fe Tax Return and all applicable schedu			I am submitting a copy of the Return and all applicable sch		
I did not file a 2020 Federal Tax Return			🗆 I did r	not file a 2020 Federal Tax R	leturn	
<u>Step</u>	One: You must select one of the follow	ving:	<u>Step</u>	One: You must select one of	the following:	
	I am a dependent student and do not to provide additional information.	t need		I am submitting a Verification Letter from the IRS.	n of Non-Filing	
	I am an independent student and am submitting a Verification of Non-Filing from the IRS.			I am not able to obtain a Ver Filing Letter from the IRS. I Financial Planning Office for	will contact the	
Step ⁻	Iwo: You must select one of the follow	/ing:	<u>Step</u>	Iwo: You must select one of t	the following:	
	I did not earn wages in 2020			I did not earn wages in 2020		
	 I earned wages in 2020 and will submit my W2 forms. My wage information is below: 			I earned wages in 2020 and forms. My wage information	5	
Empl	oyer: Earned: _\$		Empl	oyer:	Earned: <u></u>	
Empl	oyer: Earned: _\$_		Empl	oyer:	Earned: _\$	
Empl	oyer: Earned: _\$		Empl	oyer:	Earned: <u></u> \$	

D. CERTIFICATIONS AND SIGNATURES

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date below. By signing this form, I (we) also authorize Wingate University to make any changes to the originally reported FAFSA data that result from the Verification process. **Warning:** *If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.*

X		Х	
Student's Signature	Date	Parent's Signature (Dependent Students Only)	Date

----- Do Not Print or Type your Name. You should make a copy of this worksheet for your records. -----