

## 2019-2020 VERIFICATION WORKSHEET FAQ's

### **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 WinLINK 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 2017?**

***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 Form.

***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 Form.

### **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 provide if I have been asked to provide a copy of my Federal 1040/A/EZ?

You should provide a copy of your **signed** 2017 Federal Tax Return Form 1040, Form 1040A, or Form 1040 EZ. Alternately, you can request a 2017 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.

Submit  
Either of  
These!



Not That!



### I was asked to provide my 2017 W2; what is that?

We will accept copies of the W2 form provided by the employer or a copy of the Wage Transcript directly from the IRS.

Submit  
Either of  
These!



You can request a copy of the 2017 Wage and Income Transcript from the IRS using any of the methods listed under the "What is an IRS Tax Return Transcript?" section above.

# 2019-2020 VERIFICATION WORKSHEET

Your 2019-2020 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 WinLINK account for a list of documents that must be submitted to our office.**



## A. STUDENT INFORMATION

P

Last Name	First Name	Middle Initial	Student ID Number
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## B. FAMILY INFORMATION

Please select your status below:

Dependent Students (D)	Independent Students (I)
<input type="checkbox"/> List the people in your parents' household; include: <ul style="list-style-type: none"> <li>a) yourself and your parent(s) (including stepparent) even if you don't live with your parents</li> <li>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, 2019 through June 30, 2020, or (2) they would have to provide parental information when applying for aid</li> <li>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, 2019 through June 30, 2020</li> </ul>	<input type="checkbox"/> List the people in your household; include: <ul style="list-style-type: none"> <li>a) yourself and your spouse</li> <li>b) your children, if you will provide more than half of their support from July 1, 2019 through June 30, 2020</li> <li>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, 2019 through June 30, 2020</li> </ul>

**Write the names of all household members, including yourself.** Include the name of the college for any household member, excluding your parent(s), who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2019, and June 30, 2020.

Full Name	Date of Birth	Relationship	College/University*	Enrolled at least ½ Time
		Self	Wingate University	Yes

*\*You will be required to submit a Sibling Enrollment Verification Form for each sibling that you have indicated is attending college during the 2019-2020 academic year.*

## C. 2017 INCOME TAX INFORMATION

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

Student ID Number: P \_\_\_\_\_

A) Parents, if Dependent Student selected on Page 1

OR

B) Spouse (if applicable), if Independent Student selected on Page 1

Student	Parent(s) / Spouse
<input type="checkbox"/> <b>I filed/will file a 2017 Federal Tax Return</b> If you already filed, did you use the IRS Data Retrieval Tool to transfer your tax data directly from the IRS? <input type="checkbox"/> Yes ..... <input type="checkbox"/> No Update the FAFSA using the <b>IRS DRT</b> <b>OR</b> Submit a copy of your <b>2017 Tax</b> <b>Return Transcript or Form 1040/A/EZ.</b>	<input type="checkbox"/> <b>I filed/will file a 2017 Federal Tax Return</b> If you already filed, did you use the IRS Data Retrieval Tool to transfer your tax data directly from the IRS? <input type="checkbox"/> Yes ..... <input type="checkbox"/> No Update the FAFSA using the <b>IRS DRT</b> <b>OR</b> Submit a copy of your <b>2017 Tax</b> <b>Return Transcript or Form 1040/A/EZ.</b>
<input type="checkbox"/> <b>I did not file a 2017 Federal Tax Return</b>	<input type="checkbox"/> <b>I did not file a 2017 Federal Tax Return</b> You must complete a <b>Verification of Non-Filing Form.</b>

Refer to the instructions provided on the first two pages of this form for assistance obtaining the requested documents.

## D. 2017 WAGE INFORMATION

Please check **all** boxes below that apply to you and your:

A) Parents, if Dependent Student selected on Page 1

OR

B) Spouse (if applicable), if Independent Student selected on Page 1

Student	Parent(s) / Spouse
<input type="checkbox"/> <b>I earned wages in 2017*</b>	<input type="checkbox"/> <b>I earned wages in 2017*</b>
<input type="checkbox"/> <b>I earned wages in 2017, but did not receive a W2</b> You must complete the following information. (Provide additional data on a separate sheet if necessary) Employer: _____ Amt. Earned: \$ _____ Employer: _____ Amt. Earned: \$ _____	<input type="checkbox"/> <b>I earned wages in 2017, but did not receive a W2</b> You must complete the following information. (Provide additional data on a separate sheet if necessary) Employer: _____ Amt. Earned: \$ _____ Employer: _____ Amt. Earned: \$ _____
<input type="checkbox"/> <b>I did not earn wages in 2017</b>	<input type="checkbox"/> <b>I did not earn wages in 2017</b>

\*Refer to your WinLINK account **or** the email sent by the Financial Planning Office to determine if you are required to submit verification of wages (W2 forms). If we have requested this information for you or your parent(s)/spouse, you must submit copies of **all**, if applicable:

- 2017 W2 Forms
- 1099 Forms
- Schedule C Forms

## E. UNTAXED INCOME

List any untaxed income from 2017 below; Leave blank if not applicable.

Student ID Number: P \_\_\_\_\_

Student	Spouse (I)	Calendar Year 2017	Parent (D)
\$	\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Don't include the value of on base military housing or the value of a basic military allowance for housing	\$
\$	\$	Veterans' non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.	\$
\$	\$	Any other untaxed income or benefits, not reported elsewhere, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. <b>Don't include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements, foreign income exclusion or credit for federal tax on special fuels.	\$
\$	\$	Cash <b>received</b> or money paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$

## F. 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.

<b>X</b>	<b>X</b>	
Student's Signature	Date	Parent's Signature (Dependent Students Only)      Date

You should make a copy of this worksheet for your records.

**Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet and all supporting documentation directly to the Office of Student Financial Planning at Wingate University.**

*Mail: Wingate University / Office of Student Financial Planning / PO Box 159 / Wingate NC 28174*

*Fax: 704-233-9396*

*Email: [finaiddocs@wingate.edu](mailto:finaiddocs@wingate.edu)*