

# 2018-19 Standard Verification Worksheet

Your student aid application was selected for review by the U.S. Department of Education. Carlow University is required by federal law to compare your application with information on this worksheet and with your 2016 federal tax documents. This includes spouse's information if married and parents' information if you are considered dependent for federal aid purposes.

**Your financial aid package is not finalized until verification is complete so it is important to submit all documentation as soon as possible!**

Once complete, necessary corrections will be submitted to the Central Processing System and you will receive an amended Student Aid Report (SAR) including required adjustments to your Expected Family Contribution (EFC).

## A. Student Information

|                                    |            |     |               |            |
|------------------------------------|------------|-----|---------------|------------|
| Last Name                          | First Name | MI  | Date of Birth | Student ID |
| Address (include apartment number) |            |     | Email Address |            |
| City                               | State      | Zip | Phone Number  |            |

## B. Family Information

List the name and age of all household members (as defined below). Also include the name of the college for household members, excluding your parent(s), who will be enrolled, at least half time, in a degree, diploma, or certificate program at a post-secondary educational institution any time between July 1, 2018 and June 30, 2019.

### Dependent Student

- Yourself
- Your parent(s), including step-parent (if applicable). Do not include your non-custodial parent.
- Your parent(s)' other dependent children if your parent(s) will provide more than half of their support from July 1, 2018 through June 30, 2019.
- Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2018 through June 30, 2019.

### Independent Student

- Yourself
- Your spouse (if applicable)
- Your children, if you will provide more than half of their support from July 1, 2018 through June 30, 2019.
- Other people only if they now live with you and you will provide more than half of their support from July 1, 2018 through June 30, 2019.

| Full Name | Age | Relationship to Student | Attending College  | Name of the College<br><small>If enrolled at least half-time during 2018-19.</small> |
|-----------|-----|-------------------------|--|--|
|           |     | Self                    | <input type="checkbox"/> Yes <input type="checkbox"/> No | Carlow University  |
|           |     |                         | <input type="checkbox"/> Yes <input type="checkbox"/> No |  |
|           |     |                         | <input type="checkbox"/> Yes <input type="checkbox"/> No |  |
|           |     |                         | <input type="checkbox"/> Yes <input type="checkbox"/> No |  |
|           |     |                         | <input type="checkbox"/> Yes <input type="checkbox"/> No |  |
|           |     |                         | <input type="checkbox"/> Yes <input type="checkbox"/> No |  |

**C. Tax Status and Requirements: Student/Spouse- Check the box that applies:**

- The student and/or spouse used the IRS Data Retrieval Tool for FAFSA on the Web to transfer 2016 IRS income information onto the student's FAFSA.
- The student and/or spouse did not or could not use the IRS Data Retrieval Tool for FAFSA on the Web. **You must attach an official 2016 IRS Tax Return Transcript (not an account transcript).** See Page 3 for instructions.
- The student and/or spouse worked but was not required to file a 2016 Federal Tax Return. Complete the section below and **attach copies of your 2016 W-2's. Independent students must also attach an IRS Non-Filing Letter for the 2016 tax year.**

| Name | Employer Name | 2016 Amount Earned |
|------|---------------|--------------------|
|      |               |                    |
|      |               |                    |

- The student and/or spouse did not work in 2016 and is not required to file a tax return. **If you are an independent student you must attach a copy of the IRS Non-Filing Letter for the 2016 tax year.**

**D. Tax Status and Requirements: Parent- if Dependent- Check the box that applies:**

- The parent used the IRS Data Retrieval Tool for FAFSA on the Web to transfer 2016 IRS income information onto the student's FAFSA.
- The parent did not or could not use the IRS Data Retrieval Tool for FAFSA on the Web. **You must attach an official 2016 IRS Tax Return Transcript (not an account transcript).** See Page 3 for instructions.
- The parent worked but was not required to file a 2016 Federal Tax Return. Complete the section below and **attach copies of your parent's 2016 W-2's and the IRS Non-Filing Letter for the 2016 tax year.**

| Name | Employer Name | 2016 Amount Earned |
|------|---------------|--------------------|
|      |               |                    |
|      |               |                    |

- The parent did not work in 2016 and is not required to file a tax return. **Attach a copy of the IRS Non-Filing Letter for the 2016 tax year.**

\_\_\_\_\_

**E. Sign and Date this Worksheet**

I/we certify that all information reported on this form is complete and correct. I/we understand that changes in my FAFSA information based on the documentation provided may result in a change in financial aid eligibility.

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent (Required for dependent students)

\_\_\_\_\_  
Date

**F. Submit this Form and ALL REQUIRED DOCUMENTS to:**

Carlow University  
Office of Financial Aid  
3333 Fifth Avenue  
Pittsburgh, PA 15213

EMAIL: [finaid@carlow.edu](mailto:finaid@carlow.edu)  
FAX: 412-578-6689

# Instructions for Obtaining Tax Documents

## FAFSA IRS Data Retrieval Tool

★ Recommended ★

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to [www.fafsa.gov](http://www.fafsa.gov) and select Login.
- Select "Make FAFSA Corrections"
- Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



**IMPORTANT:** If you successfully used the Data Retrieval Tool you do not need to submit a Tax Return Transcript

## Don't Want to Use the Data Retrieval Tool?

**If you are unable to use the Data Retrieval Tool, or you choose not to, you must submit:**

1. a paper copy of all required Tax Return Transcript(s) **and**
2. copies of W-2's or 1099 forms from ALL employers (student and parent). *Replacement copies of W-2's can be obtained from your employer or you may obtain a Wage and Income Transcript from the IRS ([www.IRS.gov](http://www.IRS.gov)).*

## Options for Getting Your IRS Tax Return Transcript

### Online Request

- Go to [www.IRS.gov](http://www.IRS.gov)
- Under the **Tools heading** on the IRS homepage, select "Get Transcript of Your Tax Records."
- Select "Get Transcript ONLINE" or "Get Transcript by MAIL."
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

**Telephone Request** - 1-800-908-9946

**Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

## Options for Getting Your IRS Verification of Non-Filing

### Online Request

- Go to [www.IRS.gov](http://www.IRS.gov)
- Under the **Tools heading** on the IRS homepage, select "Get Transcript of Your Tax Records."
- Select "Get Transcript ONLINE" or "Get Transcript by MAIL."
- Request "Verification of Non-Filing"

**Paper Request Form** - IRS Form 4506-T

## Tax Filers with Special Circumstances

**Individuals Who Filed an Amended IRS Income Tax Return** - Provide a copy of the IRS tax return transcript **and** a signed copy of the IRS Form 1040X.

**Individuals Who Were Victims of Tax Administration Identity Theft** - Call the IRS at 1-800-908-4490 and complete Financial Aid Form 1e.

**Individuals Who Filed Non-US Income Tax Returns** - Provide a signed copy of that income tax return(s); **or** a transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for the tax year.