

■ FINANCIAL AID, SCHOLARSHIPS, & VETERANS SERVICES

2020-2021 Independent I

Campus Box 4038, 1 Kellogg Circle, Emporia, KS 66801-5415 Phone: (620) 341-5457 or 1-800-896-0567 Fax: (620) 341-6088 finaid@emporia.edu

Institutional Verification Form

Complete this form, attach copies of all requested documents and return it to the address above. Failure to respond promptly will delay processing of your financial aid (CFR Title 34, Part 668).

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Last Name		First Name		Student ID #
Address (local if available)_			_Date of Bir	rth
City	_State	ZIP code	Phone nu	ımber

B. Family Information

List below the people in your household, include

- Yourself
- Your spouse, if you are married (even if you were not married in 2018)
- Your children if you provide more than half of their support*; and will continue to provide support from July 1, 2020 through June 30, 2021
- Your unborn child, if that child will be born before May 14, 2021 and you will provide more than half of the child's support*.
- Other people, if they live with and receive more than half of their support* from you from July 1, 2020 through June 30, 2021.

*Support includes money, gifts, loans, housing, food, clothes, car, medical/dental care, etc.

Full name of family member (Begin with yourself)	Age	Relationship to student (self, spouse, son, daughter etc.)	Name of college for any family member who will be working toward a degree or certificate at least ½ time during the 2020-2021 academic year.
Bea A. Hornet (Example)	23	Self	Emporia State University

C. Tax Forms and Income Information

Did you or your spouse (if applicable) file a 2018 IRS Tax Return?

Check the applicable box in each column below.

Student	Spouse	
☐ Yes – Complete Sections D & F	☐ Yes – Complete Sections D & F	
□ No – Complete Sections E & F	□ No – Complete Sections E & F	

D. Did you or your spouse (if applicable) use the IRS Data Retrieval Tool?

Check the applicable box in each column below.

Student		Spouse		
	Used IRS Data Retrieval Tool in the	□ Used IRS Data Retrieval Tool in the		
	FAFSA to transfer 2018 IRS income ¹ .	FAFSA to transfer 2018 IRS income ¹ .		
	Ineligible or chooses not to use the IRS	☐ Ineligible or chooses not to use the IRS		
	Data Retrieval Tool and will provide the	Data Retrieval Tool and will provide the		
	school either:	school either:		
	 2018 Tax Return Transcript² 	 2018 Tax Return Transcript² 		
	or	or		
	 2018 Signed Federal Tax Return. 	 2018 Signed Federal Tax Return. 		
	Also provide Schedule 1, 2, & 3 of	Also provide Schedule 1, 2, & 3 of		
2018 tax return if filed.		2018 tax return if filed.		

¹IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows applicants who have already filed their federal income tax returns to populate the answers to some questions on the Free Application for Federal Student Aid (FAFSA) by transferring data from their federal income tax returns direct from the IRS.

²Ineligible to use the IRS Data Retrieval Tool

Most students are eligible to use the IRS Data Retrieval Tool if they have already filed their taxes. However, there are a few scenarios in which students are ineligible to use the IRS Data Retrieval Tool, such as:

- The student is married, and either the student or their spouse filed as Married Filing Separately.
- The student is married, and either the student or their spouse filed as Head of Household.
- The student or spouse filed a Puerto Rican or foreign tax return.

Any student/spouse ineligible to use the IRS Data Retrieval Tool can either request their tax return transcripts from the IRS or provide a signed copy of their 2018 federal tax return. To obtain a 2018 Tax Return Transcript go to www.irs.gov and click on the "Get a tax transcript" link. You will have the option of either logging in and printing your tax return transcript immediately, or you can request the tax return transcript be mailed to the mailing address on your latest tax return. You can also request a tax return transcript by completing Form 4506T-EZ.

Amended Tax Returns

If you filed a Form 1040X amended tax return for 2018, we will need a signed copy of the Form 1040X that was filed with the IRS before verification can be completed.

Do not complete Section E if you filed a 2018 IRS Tax Return

E. Non-filer's Income Information

Will not file and not required to file a 2018 U.S. Income Tax Return based on income thresholds established by the IRS or foreign taxing authority. If you did not file, you must complete the section AND submit copies of all 2018 W-2's. If you had no earnings enter a zero in the yearly amount field below. All non-filers must also submit a Verification of Nonfiling from IRS for the 2018 tax year. A verification of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7.

STUDENT	2018 Yearly	<u>SPOUSE</u>	2018 Yearly	
Employers Name	Amount Earned	Employers Name	Amount Earned	
(Attach copies of W-2's)		(Attach copies of W-2's)		
	\$		\$	
	\$		\$	
	\$		\$	
Student		Spouse		
☐ Check here if the Verification of Nonfiling from the IRS is included with this worksheet		☐ Check here if the Verification of Nonfiling from the IRS is included with this worksheet		
 Check here if the Verification of Nonfiling from the IRS will be submitted later. (Verification cannot be completed until the Verification of Nonfiling has been submitted.) 		□ Check here if the Verification of Nonfiling from the IRS will be submitted later. (Verification cannot be completed until the Verification of Nonfiling has been submitted.)		
F. Sign This Form: I certify that the information reported on this form is complete and correct. I understand that if I purposely give false or misleading information, I may be fined, sentenced to prison, or both.				
		Date		
Signature of student				

Digital and electronic signatures are not acceptable.

Spouse (Optional)

https://emporia.sharepoint.com/sites/FASVS-SPD/Shared Documents/Forms FA/2021/Independent Verification WS 20-21 (TAX RETURN OK).docx