

Office of Student Financial Services University of Central Missouri P.O. Box 800 Warrensburg, MO 64093	1100 Ward Edwards Building Phone: 660-543-8266 Fax: 660-543-8080 Website : www.ucmo.edu/sfs	UCM Office Use Only
2019/2020 FAFSA Verification Worksheet		
Before your financial assistance for the 2019/2020 award year can be finalized, federal regulations require that certain data from your Free Application for Federal Student Aid (FAFSA) be verified for accuracy. Therefore, complete ALL sections of this worksheet and submit it to the UCM Office of Student Financial Services. DO NOT leave any section blank and use BLACK INK.		VRF20D / VRF20I
<i>This completed worksheet (along with photocopies of any required documents) should be mailed, brought, or faxed (660-543-8080) as soon as possible to the Office of Student Financial Services.</i>		

Student: _____ 700 _____
 Last Name First M.I. UCM ID Number:

Permanent/Home Mailing Address:

 Number/Street/Apt. Permanent/Home Telephone #

 City State Zip Code Student Telephone or Cell #

Section A: Family Information

For FAFSA Verification purposes, you're classified as **Dependent** if you were **REQUIRED** to provide parental data on your FAFSA. You're classified as **Independent** if you were **NOT** required to provide parental data.

Dependent Students: List below the people in your **parent's household**. Include:

- yourself **and** your parent(s), including any stepparent who lives with you. **Don't include a non-custodial parent.**
- your parents' other children if your parents will provide more than half their financial support between July 1, 2019 and June 30, 2020, **and**
- other people if they now live with your parents, and your parents provide more than half of their financial support and will continue to provide more than half of their financial support between July 1, 2019 and June 30, 2020. However, do not include any foster children.
- Provide the name of the college or university (**or N/A**) that each family member (excluding your parents) will attend between July 1, 2019 and June 30, 2020.

Independent Students: List below the people in **your household**. Include:

- yourself (and your spouse, if you're currently married), **and**
- your children if you'll provide more than half of their financial support between July 1, 2019 and June 30, 2020 **and**
- other people if they now live with you, and you provide more than half their financial support and will continue to provide more than half of their financial support between July 1, 2019 and June 30, 2020.
- Provide the name of the college or university (**or N/A**) that each family member will attend between July 1, 2019 and June 30, 2020.

Full Name	Birthdate	Relationship to you	Name of College/University
<i>You (the student)</i>		<i>Self</i>	<i>University of Central Missouri</i>

Please continue on Page 2 ...

SECTION B: Income Information for 2017 Calendar Year (January 1, 2017 through December 31, 2017)**-Student's Income** (check only one option and submit requested documents)

I filed or will file a 2017 Federal Tax Return

All students: Use the IRS Data Retrieval Tool within FAFSA on the web **OR** submit all pages of your 2017 IRS Tax Return Transcript(see below)

I worked in 2017 but am not required to file a 2017 Federal Tax Return **and** have not/will not file a 2017 Federal Tax Return.

All Students: Submit copies of your 2017 W-2(s) received from your employer or a signed, written statement if no W-2 was ever issued.

Independent Students: Also submit a 2017 IRS Verification of Non-filing Letter. (See below)

I did not work and have not/will not file a 2017 Federal Tax Return.

Independent Students only: Submit a 2017 IRS Verification of Non-filing Letter. (See below)

I corrected my 2017 Federal Income Tax Return using an Amended Tax Return (Form 1040X)

All students: Submit a signed copy of the Form 1040X filed with the IRS, **AND** a 2017 IRS Tax Return Transcript. (See below)

-Parent's Income(for dependent students) **OR Spouse's Income** (for married independent students)

(check only one option and submit requested documents)

I (we) filed or will file a 2017 Federal Tax Return

Use the IRS Data Retrieval Tool within FAFSA on the web **OR** submit all pages of your 2017 IRS Tax Return Transcript (see below)

I (we) worked in 2017 but am(are) not required to file a 2017 Federal Tax Return **and** have not/will not file a 2017 Federal Tax Return.

Submit a 2017 IRS Verification of Non-filing Letter. (See below) **AND** Submit copies of your 2017 W-2(s) received from your employer or a signed, written statement, if no W-2 was ever issued.

I (we) did not work and have not/will not file a 2017 Federal Tax Return.

Submit a 2017 IRS Verification of Non-filing Letter. (See below)

I (we) corrected my(our) 2017 Federal Income Tax Return using an Amended Tax Return (Form 1040X)

Submit a signed copy of the Form 1040X filed with the IRS, **AND** a 2017 IRS Tax Return Transcript. (See below)

IMPORTANT: For married students or parents(married or unmarried) considered to be in the same household—if you and your spouse/partner did not file a joint return, each spouse or parent must submit either a 2017 Tax Return Transcript or a 2017 Verification of Non-filing Letter per the instructions above. **REMEMBER to include the student's name and UCM student id# on each document submitted.**

2017 Tax Return Filed: (Submit tax information using either option below. Note that we cannot use Tax Returns)**1) Use IRS Data Retrieval Tool Within FAFSA**

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) within FAFSA on the Web.

- a. If you and/or your parents used the IRS DRT when you completed your FAFSA on the Web, we should have your tax return data.
- b. If you and/or your parent did **NOT** use the DRT, and you are eligible, you may re-submit your 2019/2020 FAFSA data at www.fafsa.gov and select the **IRS Data Retrieval Tool**.

2) Obtain and submit IRS Tax Return Transcript

If you cannot use the IRS DRT, you may obtain a **2017 Tax Return Transcript** free-of-charge using one of these methods: (Please note than an **IRS Tax Return Transcript** is the **ONLY** document we can accept to verify tax return data. The Return Transcript will be mailed to you within 5-10 calendar days if you cannot print it online.)

- a. On-line or by mail at www.irs.gov/Individuals/get-transcript.
- b. Order by phone: **1-800-908-9946** using the IRS automated phone transcript service.
- c. Download and complete an *IRS Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript*. (download form from IRS web site: www.irs.gov/pub/irs-pdf/f4506tez.pdf.) Mail or fax the completed form to the IRS (see page 2 of the form)

2017 Taxes Not Filed: (obtain and submit Verification of Non-Filer Letter using either option listed below)**1) Get Transcript ONLINE: Go to <https://www.irs.gov/individuals/get-transcript>**

You may have to turn off pop-up blockers.

- a. Click on Get Started or Log In as a Returning User (you must have a mobile phone, email address and ONE of the following: credit card, Mortgage, Home Equity Loan or Line of Credit, Auto Loan). If you do not meet the criteria, see #2.
- b. Complete verification steps.
- c. Create a username and password or login to preexisting account.
- d. Use the address currently on file with the IRS.
- e. Select the reason for getting a transcript "Higher Education/Student Aid".
- f. Click on the year (2016) under "Verification of Non-Filing Letter". If this option does not appear for you then click 2017 under the Tax Return Transcript heading and submit this form to our office.
- g. You can then print the letter to submit to our office.

2) Request Non-Filer letter via mail:

Complete Form 4506-T

- a. Go to <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- b. Complete the form in full. Read each line carefully.
- c. **Please do not use line 5, as mailing to a third party will slow the processing time.**
- d. Check box 7, Verification of Non-Filing.
- e. In box 9, indicate the tax year 12/31/2017.
- f. Fax or mail to the appropriate number or address listed on page 2.

Please note: A taxpayer may fail to file a tax return even though there is a filing requirement. The verification of Non-Filer letter does not address whether or not the taxpayer should have filed a tax return. For information on who is required to file please visit this IRS link:

<https://www.irs.gov/help/ita/do-i-need-to-file-a-tax-return>

