

Beloit College 2020-2021 Verification Worksheet

Dependent Student

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The federal government requires us to confirm the information you and your parent(s) reported on your FAFSA prior to awarding Federal Student Aid. To verify that you provided correct information, the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents you are required to submit. You and at least one parent must complete and sign this worksheet, attach the required documents, and submit the form to the financial aid administrators at Beloit College's Office of Financial Aid. You may be contacted by the Financial Aid office staff to request additional information or for clarification regarding the information you provided. If you have questions about verification, contact the Office of Financial Aid.

Mailing address: Office of Financial Aid
700 College Street
Beloit, WI 53511

Phone: 608-363-2663
Fax: 833-694-0319
Email: faoffice@beloit.edu

Securely upload your documents:
<https://beloit.leapfile.net>

A. Student's Information

Student's Last Name

Student's First Name

MI

Student ID #

B. Student's Parent Information

Parent(s): Please list below the parent(s) with whom you live, including stepparents (if applicable).

Parent Name(s)	Parent's Relation to Student
<i>Deborah Jones (example)</i>	<i>Mother (example)</i>

C. Yourself and Other Household Members

Please list below the people in the parents' household. Include:

- Yourself (the student).
- The parents' other children, if the parent(s) will provide more than half of the children's support from July 1, 2020 through June 30, 2021.
 - Include other children who would be required to provide parental information if they were completing a FAFSA for 2020-2021.
 - Include children who meet any of these standards even if the children do not live with the parent(s) but still receive more than half of their financial support from the parent(s) listed above.
- Other people if they now live with the parents and the parents provide **more than half** of the other people's support and **will continue to provide** more than half of their support through June 30, 2021 (examples: grandparent, nephew, etc.).

Please also write in the name of the college/university for other household members who will be attending college at least half time between July 1, 2020 and June 30, 2021, and will be enrolled in a degree or certification program.

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	Name of College/University (if any)	Will be Enrolled at Least Half Time (Yes or No)
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		<i>(Self)</i>		

D. Student Income and Tax Information

Please check the box that applies to you (the student). Please note: some fields will require additional action from you. If you need additional assistance, please see page 3 for instructions and tips or contact the Office of Financial Aid.

I, the student, filed a 2018 IRS income tax return and am providing my tax information by:

Using the IRS Data Retrieval Tool on my FAFSA application

-OR-

Providing a copy of my 2018 IRS Tax Return Transcript, Schedule 1, 2, 3, and 4 obtained from the IRS (at www.irs.gov)

-OR-

I, the student, **have not and am not required** to file a 2018 IRS income tax return and have **no** earnings from work in 2018

-OR-

I, the student, am not required to file a 2018 IRS income tax return but received a W-2(s) form and included a copy with this worksheet. Please complete the chart below and report your employer and earnings **even if your employer did not issue you a W-2.**

Employer's Name	2018 Amount Earned	IRS W-2 Attached? (Yes or No)
<i>ABC Shipping (Example)</i>	<i>\$1,280</i>	<i>Yes</i>

E. Parent(s) Income and Tax Information

Please check the box that applies to your parent(s)' earned income and tax information. Please note: some fields will require additional action from you. If you need assistance, please see page 3 for instructions and tips or contact the Office of Financial Aid.

My parent(s) have filed a 2018 IRS income tax return and is/are providing their tax information by:

Using the IRS Data Retrieval Tool on my FAFSA (**Parent who filed an amended (1040X) or have an IRA or Pension rollover will be asked to provide additional documentation**)

-OR-

Providing a copy of their 2018 IRS Tax Return Transcript, Schedule 1, 2, 3, and 4 obtained from the IRS (obtained from www.irs.gov)

-OR-

My parent(s) **has/have not and is/are not required** to file a 2018 IRS income tax return **and** had no earnings from work in 2018. My parent(s) will provide a Verification of Non-Filing letter from the IRS (obtained from www.irs.gov)

-OR-

My parent(s) **have not and are not required** to file a 2018 IRS income tax return **but** had some earnings from work in 2018. My parent(s) will provide a Verification of Non-Filing letter from the IRS, copies of all W-2(s) from 2018, and complete the chart below **even if their employer did not issue a W-2:**

Employer's Name	2018 Amount Earned	IRS W-2 Attached? (Yes or No)
<i>XYZ Shipping (Example)</i>	<i>\$8,054</i>	<i>Yes</i>

F. Student and Parent Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fine, jailed, or both.**

Student's Signature (Required)

Date

Parent's Signature (Required)

Date

Instructions Page

Please fill out page 1 and 2 to the best of your ability. This page does not need to be submitted to the Office of Financial Aid with page 1 and 2. If you have any questions, please feel free to contact the Office of Financial Aid at faoffice@beloit.edu or call 608-363-2663.

How to use the IRS Data Retrieval Tool (DRT) to import tax data into the FAFSA

1. Go to www.fafsa.ed.gov, click the green "Login" button and log in using the student's FSA ID and password.
2. Click "Make FAFSA Corrections" on the homepage and create a Save Key.
3. Click on the "Financial Information" tab.
4. For the question "Have your parents completed their IRS income tax return" choose "Already Completed."
5. Answer the questions in the pop-up box. If all questions are answered "No," you are eligible to use the IRS Data Retrieval Tool. Click on the button to opt into using the IRS Data Retrieval Tool.
6. Select answer to "which parent are you," enter parent's FSA ID and click "Link to IRS."
7. Click "OK" to "Leaving FAFSA on the Web."
8. Click "OK" to the pop-up message "This Gov't System is for Authorized Use Only."
9. Enter information request (Filing Status, Address, etc.) and click "Submit." If the transfer is successful, you may proceed to step 10. If any of the answers you reported does not match the IRS records, the search for the tax data will not be successful. Please be sure to include correct zip codes, apartment numbers, PO boxes, etc. The address must match the address reported on the most recent tax return and the parent SSNs must be correct.
10. Click "Transfer my tax information into the FAFSA" on the left of the page and click "Transfer Now" on the right.
11. Repeat this process for student if the student has filed taxes- If not, click "Next" at the bottom of the Financial Information Page.
12. You will be directed back to the FAFSA webpage. At the "List of Changes," review, then scroll to the bottom and click "Next."
13. Click "Sign and Submit" and follow instructions to submit the changes.
14. You will receive a confirmation number and a confirmation email.

Please note: Independent students will not need to submit parent information but will follow the same steps for entering their own tax information.

How to request an IRS Tax Return Transcript

*Tax Account Transcripts and signed copies of the tax return are **no longer acceptable for verification purposes.***

There are four different ways to request a tax return transcript:

- 1) **ONLINE:** Go to IRS.gov, click on "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two step authentication. If you are unable to create an account online, see #2.
- 2) **MAIL:** Go to IRS.gov, click "Get Your Tax Record" and then click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 3) **BY PHONE:** To order by phone, call 800-908-9946 and follow the prompts.
- 4) **PAPER:** Complete Form 4506-T (can be obtained from IRS.gov or <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) and mail/fax into the address listed on the form.

How to request a Verification of Non-Filing Letter

The Verification of Non-Filing Letter provides proof that the IRS has no record of a filed Form 1040, 1040A, or 1040EZ for the year you requested. It doesn't indicate whether you were required to file a return for that year.

There are two ways to request a Verification of Non-Filing Letter:

- 1) **ONLINE:** (For individuals who have filed taxes in prior years only. If you have never filed a tax return before, please see #2) Go to IRS.gov and click on Get Your Tax Record. Click "Get Transcript ONLINE." If at any point you cannot validate your identity, please see #2.
- 2) **Paper Request:** Download the IRS Form 4506-T at IRS.gov. Complete the form and submit to the IRS using the address or fax number provided on page 2 of the form. You can expect to receive the Verification of Non-Filing via mail within 10 days.

Having issues with requesting these items from the IRS?

The IRS.gov help desk can be reached at 1-800-876-1715.