

2020- 2021 Verification Worksheet (5)

Your FAFSA was selected by the U.S. Dept. of Education for review in a process called **“verification”**. In this process, we are required by Federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with an IRS Tax Return Transcript of your 2018 Federal tax filing (and your spouse’s if you are married, or parents’ if you are considered dependent for Federal aid purposes). If there are differences between your FAFSA and the documents submitted, corrections will be made by our office.

What you should do:

1. Collect your (and your spouse’s or parents’) financial documents (IRS Tax Return Transcripts, 1040’s, and/or W-2’s)
2. **Complete all of the sections and sign the worksheet.** You (and a parent if you are required to provide parent income information) must complete all sections.
3. Contact the Office of Financial Aid if you have questions about this form.

1. Student Information

Last Name	First Name	MI	Social Security Number	
Address (include apt. #)		City	State	Zip
Date of Birth	Email Address		Phone Number (include area code)	

2. Family Information

INDEPENDENT STUDENTS: List the people that you (and your spouse) will support between July 1, 2020 and June 30, 2021.

Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2020 – June 30, 2021. Exclude children/siblings whom are wards of the state, i.e. foster care.

DEPENDENT STUDENTS: List all the people in your household between July 1, 2020 and June 30, 2021. Include yourself, your parent(s)/step-parents, and your parents’ other children if (a) your parents provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. Include other people only if they now live with your parents and receive, and will continue to receive, more than half their support from them between July 1, 2020 and June 30, 2021. Exclude children/siblings whom are wards of the state, i.e. foster care.

INDEPENDENT AND DEPENDENT: Write the name of the college for any family member who will be attending college at least half-time between July 1, 2020 and June 30, 2021 and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship	College (attending at least ½ time)
<i>Example: Martha Jones</i>	<i>22</i>	<i>Self</i>	<i>McKendree University</i>

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

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.

3. Student Tax and Income Information

Did you (the student) file a 2018 Federal Tax Return? Please check only **ONE** box below:

- ☐ Yes, I used the IRS Data Retrieval Tool to import my 2018 income information into the FAFSA.
- ☐ Yes, but I was unable or chose not to use the IRS Data Retrieval Tool. I am **attaching** a 2018 IRS Tax Return Transcript that I requested at <https://www.irs.gov/individuals/get-transcript> or I am **attaching** a signed copy of my 2018 Federal Tax Return.
- ☐ No, I was not employed and had no income earned from work in 2018.
- ☐ No, I will not file and am not required to file a 2018 IRS Federal Tax Return. I did earn income from work in 2018 as listed below.

- **Complete the chart below:** list employer(s) and the amount that was earned in 2018
- **Attach copies** of all 2018 W-2 and 1099 forms for each employer/source listed below

Student's Source of Income/Support	2018 Amount Earned

4. Parents Tax and Income Information

****Dependent students only, using Parent Information of those listed on the 2020-2021 FAFSA**

Did your parent(s) file a 2018 U.S. Federal Tax Return? Please check only **ONE** box below:

- ☐ Yes, the student's parent(s) used the IRS Data Retrieval Tool to import their 2018 income information into the FAFSA.
- ☐ Yes, but the student's parent(s) were unable or chose not to use the IRS Data Retrieval Tool. I am **attaching** a 2018 IRS Tax Return Transcript that I requested at <https://www.irs.gov/individuals/get-transcript> or I am **attaching** a signed copy of my 2018 Federal Tax Return. *NOTE: If married and filing separate returns or if biological parents live together and are not married, a signed tax return is required for both parents.*
- ☐ No, Parent(s) was not employed and had no income earned from work in 2018. I am **attaching** a Verification of Non-Filing Letter for each of my parent(s) listed on the FAFSA. (IRS Verification of Non-Filing can be completed at <https://www.irs.gov/forms-pubs/about-form-4506-t>)
- ☐ No, Parent(s) will not file and are not required to file a 2018 IRS Federal Tax Return. They did earn income from work in 2018 as listed below.

- **Complete the chart below:** list employer(s) and the amount that was earned in 2018
- **Attach copies** of all 2018 W-2 and 1099 forms for each employer/source listed below.
- **Submit** a 2018 IRS Verification of Non-filing Letter. Each parent in the household who did not file must submit one.

Parent(s)'s Source of Income/Support	2018 Amount Earned

5. *Untaxed Income (Student and Parents)*

Did you or your parent(s) receive any Untaxed Income during 2018?

☐ No

☐ Yes

If yes, please provide source (such as Untaxed Pensions, IRA Deductions and Payments, Tax Exempt Interest, and Untaxed IRA Distributions) and list annual amount below: If nothing is checked we will assume No.

Source of Untaxed Income	Student Untaxed Income Annual Amount	Spouse or Parent Untaxed Income Annual Amount

6. *High School Completion Status*

Provide **one** of the following documents that indicate the student's high school completion status when the student will begin college in 2020- 2021:

- ☐ A copy of the student's high school diploma.
- ☐ A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- ☐ A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- ☐ For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- ☐ An academic transcript that shows the successful completion of at least a two-year program acceptable for full credit toward a bachelor's degree.

Copy of high school completion for homeschooled students:

- ☐ For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- ☐ For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

7. Identity and Statement of Educational Purpose**Identity and Statement of Educational Purpose
(To Be Signed at the Institution)**

The student must appear in person at **McKendree University** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
(Print Student's Name)

Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **McKendree University** for 2020- 2021.

(Student's Signature)

(Date)

(Student's ID Number)

(School Official's Signature Present at Signing)

(Date)

If this form cannot be signed before a McKendree University representative, please complete the following form in front of a Notary.

Only complete this page if you cannot appear in person to complete Section C.**Identity and Statement of Education Purpose
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at **McKendree University** to verify his or her identity, the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
(Print Student's Name)

Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **McKendree University** for 2020-2021.

(Student's Signature)

(Date)

(Student's ID Number)

If this form was not signed in the Office of Financial Aid you must sign in the presence of a Notary and have the following Notary's Certification completed:

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____
(Date) (Notary's Name)

personally appeared, _____, and proved to me on basis of
(Printed name of signer)

satisfactory evidence of identification _____ to be the above-
(Type of unexpired government-issued photo ID provided)

named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary Signature)

My commission expires on _____
(Date)

Print Student's Name

Student's Social Security

8. *Certifications and Signatures*

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent (if the student is a dependent student) whose information was reported on the FAFSA must sign and date below.

Federal Warning: If you purposely give false or misleading information you may be fined, sentenced to jail, or both.

Student's Signature

Date

Parent's Signature (dependent student only)

Date

Print student's name

Print parent's name (dependent student only)

Submit this form and all other required documents to the Office of Financial Aid at McKendree University:

Mail to:
Office of Financial Aid
701 College Road
Lebanon, Illinois 62254

Or by Fax to:
618-537-6530

Or in person:
Lebanon Campus, Old Main,
1st Floor