

**Walsh University**  
**Student Service Center – Financial Aid Office**

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**2020-2021**

*Independent  
 Students* →

*For INDEPENDENT Students (when parent's information is NOT required on the FAFSA)*

**2020-2021 Verification Worksheet**

Your application 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 on your FAFSA with the information provided on **this Worksheet** and with your **2018** federal tax information. If there are differences between your application and the documents you have submitted, corrections may need to be made. **We cannot process your financial aid until Verification has been completed, so please provide the required documents as soon as possible.**

As stated above, in addition to completing this worksheet, you must also provide federal tax information. Please take time to carefully read the information to the right regarding acceptable federal tax reporting methods. *This is a federally-mandated process.*

**Reporting 2018 Tax Information**

**There are TWO ways you can report federal tax information to Walsh University:**

**Return to your FAFSA at [www.fafsa.gov](http://www.fafsa.gov) and request that the tax data be loaded from the IRS database. This is the easiest and fastest method. Note: Married couples filing separately CANNOT use this transfer option.**

**OR**

**Submit an IRS Tax Transcript to Walsh University (see back for more information). This form must be requested from the IRS by you.**

Tax Filers who are unable to obtain IRS Tax Transcripts because of *IRS Identity Theft* may call 1-800-908-4490 to request a Tax Return Database View (Form TRDBV).

**A. Student Information**

\_\_\_\_\_ *Last Name*                      \_\_\_\_\_ *First Name*                      \_\_\_\_\_ *M.I.*                      \_\_\_\_\_ *Student ID or Social Security Number*

**B. Family Information**

\_\_\_\_\_ *Telephone Number*

**X Independent Students:** In the box below, list the people in your household; include (a) yourself, your spouse (if married), (b) children, if you provide more than half of their support from July 1, 2020 through June 30, 2020, and (c) any other people if they now live with you, and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2020 through June 30, 2021. Do **not** include foster children or children for whom you are paying child support.

**Write the names of all household members who meet the definition above and their relationship to you.** Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2020, and June 30, 2021, and include the name of the college. If more space is needed, provide a separate page with the student's name and ID number at the top.

| <i>Full Name</i> | <i>Age</i> | <i>Relationship</i> | <i>College</i>          | <p><b>?</b><br/>                     Did you remember to list only family members that meet the definition above?</p> |
|------------------|------------|---------------------|-------------------------|---|
|                  |            | <i>Self</i>         | <i>Walsh University</i> |   |
|                  |            |                     |                         |   |
|                  |            |                     |                         |   |
|                  |            |                     |                         |   |
|                  |            |                     |                         |   |

## C. Tax Forms and Income Information

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You must provide 2018 federal tax information as part of the Verification Process for both you (the student) and your spouse (if married). Please indicate below how you are providing this data to us.

**Check one:**

\_\_\_ My 2018 IRS data has already been transferred onto my FAFSA via the IRS Data Retrieval Tool (DRT) option available to me.

(ATTENTION MARRIED STUDENTS FILING SEPARATELY: You do not have the option of IRS data transfer to your FAFSA. If you and your spouse filed separately, each person must submit a 2018 IRS Tax Return Transcript to Walsh University.)

\_\_\_ I am attaching my/my spouse's (if married) federal 2018 IRS Tax Return Transcripts that I obtained from the IRS. \*Please list your name (the student) and your student ID number at the top of the transcripts before submitting them to the Student Service Center.

(You may order transcripts by going to [www.IRS.gov](http://www.IRS.gov) and clicking on "Get Your Tax Record" option, by calling 800-908-9946 or by completing and mailing Form 4506-T to the IRS. (Remember, copies of tax returns are not acceptable.)

\_\_\_ I/my spouse (if married) will not file federal taxes for 2018 and am not required to do so. In this case, the following is required:

Was income earned even though you/your spouse did not file? \_\_\_\_\_ If yes, you MUST provide the following:

- Indicate the amount(s) of money you/your spouse earned from work: \_\_\_\_\_
- Enclose a copy of you/your spouse's 2018 W-2(s)

**REQUIRED (even if no income was earned):** Provide documentation from the IRS dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority for you/your spouse. This can be obtained by completing an IRS form 4506-T or by going to [www.irs.gov](http://www.irs.gov) and attempting to request a tax return transcript for 2018. (If married, separate documentation is required for each person.)

\_\_\_ I filed a 2018 Tax Deadline Extension. (Walsh will contact you with additional instructions.)

## D. Sign this Worksheet

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Each person signing below certifies that all of the information reported is complete and correct.

**Warning:** If you purposely give false or misleading information, you may be fined, sent to prison, or both.

\_\_\_\_\_  
Student's Signature

Date \_\_\_\_\_

\_\_\_\_\_  
Spouse's Signature (if married)

Date \_\_\_\_\_

**DO NOT submit this form until you have gathered all required documents/forms to avoid delays in processing. Once you have all of your required documents gathered, please return them to the Student Service Center in Farrell Hall. You may fax, mail, or drop off your documents. Forms can also be uploaded to our secure financial aid document portal. Instructions can be found at <https://www.walsh.edu/uploads/securely-send-documents-to-walsh.pdf>.**