Walsh University Student Service Center – Financial Aid Office

2021-2022

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Email: finaid@walsh.edu

Independent Students

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

2021-2022 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 2019 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 2019 Tax Information

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

Return to your FAFSA at www.studentaid.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 <u>you</u>.

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).

| Last Name | First Name | M.I. | Student ID or Social Security Number |
|-----------|------------|------|--------------------------------------|

B. Family Information

A. Student Information

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Telephone Number

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, 2021 through June 30, 2022, 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, 2021 through June 30, 2022. 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, 2021, and June 30, 2022, 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.

| Full Name | Age | Relationship | College | ? |
|-----------|-----|--------------|------------------|--------------------------|
| | | Self | Walsh University | Did you |
| | | | | remember to list only |
| | | | | family |
| | | | | members that |
| | | | | meet the definition |
| | | | | above? |

C. Tax Forms and Income Information

| <u>heck o</u> | ne: |
|---------------------|---|
| (DR (ATT FAFS | 2019 IRS data has <u>already</u> been transferred onto my FAFSA via the IRS Data Retrieval Tool T) option available to me. ENTION MARRIED STUDENTS FILING SEPARATELY: You do not have the option of IRS data transfer to your SA. If you and your spouse filed separately, each person must submit a 2019 IRS Tax Return Transcript to Walsh ersity.) |
| obta | n attaching my/my spouse's (if married) federal 2019 IRS Tax Return Transcripts that I ined from the IRS. *Please list your name (the student) and your student ID number at the te transcripts before submitting them to the Student Service Center. |
| | u may order transcripts by going to www.IRS.gov and clicking on "Get Your Tax Record" option, by ing 800-908-9946 or by completing and mailing Form 4506-T to the IRS. |
| | spouse (if married) will not file federal taxes for 2019 and am not required to do so. In this composition of some sequired: |
| | sincome earned even though you/your spouse did not file?es, you MUST provide the following: - Indicate the amount(s) of money you/your spouse earned from work: - What was the source of the income? - Enclose a copy of you/your spouse's 2019 W-2(s) |
| Octo | QUIRED (even if no income was earned): Provide documentation from the IRS dated on or after ober 1, 2020 that indicates a 2019 IRS income tax return was not filed with the IRS or other relevant authority for you/your spouse. This can be obtained by completing an IRS form 4506-T or by going v.irs.gov and attempting to request a tax return transcript for 2019. (If married, separate amentation is required for each person.) |
| _ I fil | ed a 2019 Tax Deadline Extension. (Walsh will contact you with additional instructions.) |
| | nis Worksheet |

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.

Spouse's Signature (if married)

Date

Student's Signature

Date