2021-2022 Verification Worksheet

Federal Student Aid Programs

Student Financial Services
400 Saint Bernardine St, FH 203
Reading, PA 19607
610-796-8201 / 610-796-8336 FAX
sfs@alvernia.edu

Your 2021-2022 Free Application for Federal Student Aid (FAFSA) was selected for process called verification. We are required to compare information from your application with copies of **2019** Federal Tax Transcripts, **2019** Signed Federal 1040 Form(s) and Schedule(s), **2019** W-2 statement(s), or other financial documents. The law states we have the right to ask you for this information before awarding Federal Student Aid. If there are differences between your FAFSA and your financial documents, we will need to make necessary corrections to your application. Complete this worksheet and submit it to the Student Financial Services Office as soon as possible so that your financial aid will not be delayed. You and at least one parent (if applicable) must sign this worksheet for it to be reviewed. For questions regarding whether you are considered dependent or independent, please contact our office.

A. STUDENT Information

Last Name	First Name	M.I	SSN
Street Address *(include apartment number)*			Date of Birth
City	State	Zip	Home Phone Number
Email Address			Cell Phone Number

B. FAMILY Information

DEPENDENT Students

- Yourself and your parent(s) (including stepparent) even if you do not live with your parents, *and*
- Your parents' other children, if (a) your parents will provide more than half of their support from **July 1, 2021 through June 30, 2022**, or (b) the children would be required to provide parental information when applying for Federal Student Aid, even if they do not live with your parent(s), *and*
- Other people if they now live with your parents and your parents provide 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**.

INDEPENDENT Students

- Yourself and, your spouse if you have one, and
- Your children, if you will provide more than half of their support from **July 1, 2021 through June 30, 2022**, even if they do not live with you, *and*
- Other people if they now live with you and you provide 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.**

Write the name, age, and relationship of all household members. If applicable, write the name of the college, university, or program for any family member, excluding your parent(s), who will be attending at least half-time and will be enrolled in a degree, diploma, or certificate program between **July 1, 2021 and June 30, 2022**.

First and Last Name	Age	Relationship	College / University / Program
Missy Jones (example)	*18*	*Sister*	*Central University*
		Self	Alvernia University

Additional space, if needed, on second page.

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B. FAMILY Information *(continued)*

First and Last Name	Age	Relationship	College / University / Program

C. TAX FORMS Information

All tax filers must provide our office with a **2019 Federal Tax Transcript, 2019 Signed Federal 1040 Forms and Schedules.** or must successfully use the IRS Data Retrieval Tool. The IRS tax transcripts can be requested online at www.irs.gov or by calling 1-800-908-9946. Feel free to attach a separate page if you need additional space.

DEPENDENT Students

STUDENT *(check only one box below)*

- ◯ Check here if you have used the IRS Data Retrieval Tool
- ◯ Check here if attaching your **2019** Federal Tax Transcript, Signed Federal 1040 Form(s) and Schedule(s), W-2 Form(s) and/or other financial documents.
- ◯ Check here if you earned income from wages in **2019**, but are NOT required to file a **2019** Federal Tax Return. Complete the chart below and submit copies of the W-2 Statement(s):
  Employer: _____ **Amt:** $ _____
  Employer: _____ **Amt:** $ _____
- ◯ Check here if you did NOT earn wages in **2019** and are NOT required to file a **2019** Federal Tax Return.

PARENT(s) *(check only one box below)*

- ◯ Check here if you have used the IRS Data Retrieval Tool
- ◯ Check here if attaching your parents' **2019** Federal Tax Transcript, Signed Federal 1040 Form(s) and Schedule(s), W-2 Form(s) and/or other financial documents.
- ◯ Check here if your parents earned income from wages in **2019**, but are NOT required to file a **2019** Federal Tax Return. Complete the chart below and submit copies of the W-2 Statement(s):
  Employer: _____ **Amt:** $ _____
  Employer: _____ **Amt:** $ _____
- ◯ Check here if your parent(s) did NOT earn wages in **2019** and are NOT required to file a **2019** Federal Tax Return and you have provided an IRS Statement of Non-Filing.

INDEPENDENT Students

STUDENT *(check only one box below)*

- ◯ Check here if you have used the IRS Data Retrieval Tool
- ◯ Check here if attaching your **2019** Federal Tax Transcript, Signed Federal 1040 Form(s) and Schedule(s), W-2 Form(s) and/or other financial documents.
- ◯ Check here if you earned income from wages in **2019**, but are NOT required to file a **2019** Federal Tax Return. Complete the chart below and submit copies of the W-2 Statement(s):
  Employer: _____ **Amt:** $ _____
  Employer: _____ **Amt:** $ _____
- ◯ Check here if you did NOT earn wages in **2019** and are NOT required to file a **2019** Federal Tax Return and you have provided an IRS Statement of Non-Filing.

SPOUSE *(check only one box below)*

- ◯ Check here if you have used the IRS Data Retrieval Tool
- ◯ Check here if attaching your spouse's **2019** Federal Tax Transcript, Signed Federal 1040 Form(s) and Schedule(s), W-2 Form(s) and/or other financial documents.
- ◯ Check here if your spouse earned income from wages in **2019**, but is NOT required to file a **2019** Federal Tax Return. Complete the chart below and submit copies of the W-2 Statement(s):
  Employer: _____ **Amt:** $ _____
  Employer: _____ **Amt:** $ _____
- ◯ Check here if your spouse did NOT earn wages in **2019** and are NOT required to file a **2019** Federal Tax Return and you have provided an IRS Statement of Non-Filing.

Has the student, spouse, and/or parent(s) amended his/her **2019 taxes**? Yes No If yes, who: _____

*(Persons who have amended their **2019 taxes** must also submit a signed copy of their **2019 1040X form** and the **2019 IRS Account Transcript** along with their **2019 IRS Tax Return Transcript**).*

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D. OTHER INCOME Information

Both tax filers and non-tax filers must list any untaxed income (such as Workman's Compensation, untaxed pensions, disability, etc) received in **2019**. Be sure to enter **ZEROES** if no funds were received. Failure to complete this section will delay the processing of your financial aid. Attach a separate page if you need more space.

DO NOT INCLUDE SOCIAL SECURITY DISABILITY OR SOCIAL SECURITY INCOME

Student and/or Spouse					Parent(s)		
2019 Amount	**Frequency**		**Source of Untaxed Income**		**2019 Amount**	**Frequency**	
$	Mo	Yr	Child Support Received		$	Mo	Yr
$	Mo	Yr	Workman's Compensation		$	Mo	Yr
$	Mo	Yr	Untaxed Pension / IRA		$	Mo	Yr
$	Mo	Yr	Untaxed Disability		$	Mo	Yr
$	Mo	Yr	Combat Pay		$	Mo	Yr
$	Mo	Yr	Veteran Non-educational Benefits		$	Mo	Yr
$	Mo	Yr	Other:		$	Mo	Yr
$	Mo	Yr	Other:		$	Mo	Yr

E. CERTIFICATION and SIGNATURES

Are all of the documents needed being submitted at the same time of this form? Yes No

If no, please explain: _____

By signing this worksheet, I (we) certify that all of the information reported on it is complete and accurate. **I (we) also understand that if not all required documents are submitted (IRS Tax Transcripts, Signed Federal 104 Form(s) and Schedule(s), W-2(s), etc) that it will delay the disbursement of Federal Aid onto the Student's Account.** If dependent, at least one parent must sign.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

_____ _____
Student Signature Date

_____ _____
Parent Signature Date

DO NOT mail a copy of this worksheet to the Department of Education.
Submit this form to the Student Financial Services Office at Alvernia University using the contact information above.
Please retain a copy of this worksheet and all documents submitted for your records.