



## 2018-2019 DEPENDENT VERIFICATION (V5) WORKSHEET

Your FAFSA was selected by the U.S. Department of Education for review in a process called "Verification." In this process Missouri S&T is required to compare information from your FAFSA with the information on this worksheet and with any other required documents. The law states we have the right to ask you for this information and review it for accuracy under the financial aid program rules (34 CFR, Part 688). **Verification must be completed before your financial aid will be credited to your student account.**

### INSTRUCTIONS

- Complete all sections of this worksheet **in full** (A-E). **Incomplete forms will be returned.**
- Student and parent(s) must use their 2016 Federal Income Tax for the 2018-2019 academic year. The easiest way to provide this information is to use the IRS Data Retrieval Tool (DRT) to transfer your 2016 tax information to your 2018-2019 FAFSA, if you have not already. **See instructions attached or go to: [sfa.mst.edu/forms/](http://sfa.mst.edu/forms/)**
- All documents must be submitted by the following deadlines:
  - Fall 2018 Enrollment: October 31, 2018
  - Spring 2019 Enrollment: March 1, 2019
- Please return all documents requested to our office via fax to (573)341-4274, email to [sfa@mst.edu](mailto:sfa@mst.edu) or mail to G-1 Parker Hall, 300 W 13<sup>th</sup> St, Rolla, MO 65409-0250.

### A. Student Information

Last Name	First Name	M.I.
Daytime Phone number (include area code)	Date of Birth (MM/DD/YYYY)	Missouri S&T Student ID#

### B. Family Information

Full Name	Age		
Write the names of the people in your parent(s)' household in the chart below: 1. Include <b>yourself</b> as the student. 2. Include <b>your parent(s): Parent #1 and Parent #2</b> <ul style="list-style-type: none"> <li>• <i>If your parents are divorced</i>, list the parent you lived with the most during the last 12 months. If you did not live with one parent more than the other, indicate the parent who provided more than half of your support during the last twelve months.</li> <li>• <i>If your parent is remarried</i>, include <b>step-parent</b>.</li> <li>• <i>If your parents are unmarried but live together</i>, list <b>one as Parent #1 and the other as Parent #2</b>.</li> </ul> 3. Include your <b>parent(s)' other children</b> , if your parents provide more than half of their support between July 1, 2018, and June 30, 2019, or if the children would be required to provide parental information if they were completing a 2018-2019 FAFSA. 4. Include <b>other dependents</b> if they now live with your parent(s) and your parent(s) will continue to provide <i>more than half</i> of their support through June 30, 2019.	Write the age of each family member in the chart below. <hr/> <b>Relationship</b> Write the relationship of each family member to the student in the chart below. <hr/> <b>College</b> Add the name of the college for any household member ( <b>excluding parents</b> ) who will be enrolled in a degree, diploma, or certificate program at an eligible postsecondary educational institution <i>at least half-time</i> at any time between July 1, 2018, through June 30, 2019.		
Full Name	Age	Relationship	College
		Self/Student	Missouri S&T

\*If more space is required, attach a separate page.

**C. Student Information (all applicants)**      *Student Name / S&T ID #:*

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**Check only one box below regarding STUDENT Information**

- a.  I filed a 2016 Federal Tax Return and used the IRS DRT when completing the FAFSA.
- b.  I filed a 2016 Federal Tax Return and will provide a Federal Tax Return Transcript from the IRS.
- c.  I was not employed, did not have income, and am not required to file a 2016 Federal IRS Tax Return.
- d.  \*I was employed and had income but am not required to file a 2016 Federal Tax Return.

<p><b>*COMPLETE ONLY IF BOX D ABOVE IS CHECKED:</b> Students who did not file a 2016 Federal Tax Return are required to submit a copy of ALL W-2(s) for 2016 from each employer. List all 2016 employers and related earnings below.</p>	
Name of Employer	Amount Earned in 2016

If more space is required, attach a separate page.

**D. Parent(s)' Information**

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**Check only one box below regarding PARENT Information**

- a.  I filed a 2016 Federal Tax Return and used the IRS DRT when completing the FAFSA.
- b.  I filed a 2016 Federal Tax Return and will provide a Federal Tax Return Transcript from the IRS.
- c.  \*I was not employed, did not have income, and am not required to file a 2016 Federal IRS Tax Return.
- d.  \*I was employed and had income but am not required to file a 2016 Federal Tax Return.

<p><b>*COMPLETE ONLY IF BOX C or D ABOVE IS CHECKED:</b> Parents who did not file a 2016 Federal Tax Return are required to submit a Verification of Non-Filing Letter from the IRS and ALL W-2(s) from each employer. List all 2016 employers and related earnings below. See the last page of this document for requesting a Verification of Non-Filing Letter. Each parent who did not file a 2016 Federal Tax Return must sign below where <b>Signature Required Only if Non-Tax Filers</b> is indicated.</p>		
Name of Non-Filer	Name of Employer	Amount Earned in 2016

If more space is required, attach a separate page.

**\*Each parent who did not file a 2016 Federal Tax Return must sign here.**

\*Parent 1 Signature Required Only if Non-Tax Filer \_\_\_\_\_

\*Parent 2 Signature Required Only if Non-Tax Filer \_\_\_\_\_

**E. Manually sign this Worksheet. Forms with electronic/typed signatures will be returned.**

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The student and at least one parent whose information was reported on the 2018-2019 FAFSA must sign and date this worksheet. Each person signing certifies that all the information reported is complete and correct. **If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

Student _____	Parent _____
Date _____	Date _____
Parent Daytime Phone number (include area code) _____	Parent Email _____

**F. High School Completion Status**

*Student Name / S&T ID #:*

**Per federal regulation**, the Missouri S&T Financial Assistance Office must receive documentation of your final high school transcript, recognized equivalent, or home-school credential. Because you will provide the S&T Admissions Office with your final transcript, we will use it to satisfy the federal requirement for verification.

**G. Documentation of Identity/Statement of Educational Purpose**

In order to complete the verification process, **you must appear in person** to the Missouri S&T Student Financial Assistance office to verify your identity by presenting a valid, unexpired government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. Military IDs cannot be accepted.

I certify that I, \_\_\_\_\_, am the individual signing this Statement of Educational 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 Missouri University of Science and Technology for 2018-2019.

\_\_\_\_\_

(Student’s Signature)

(Date)

(Student’s ID Number)

**Note:** *If you cannot appear in person to complete Section G above, you must contact the Student Financial Assistance Office and provide the reasons for your non-availability. The Student Financial Assistance office will contact you with further instructions on how to complete this section.*

**FOR OFFICE USE ONLY: Attach photocopy of ID after verifying identity**

Document Provided: \_\_\_\_\_ Date Received: \_\_\_\_\_ Staff Signature: \_\_\_\_\_

## DATA RETRIEVAL INSTRUCTIONS

The Easiest and Fastest way to complete your verification is to use the IRS Data Retrieval on your completed FAFSA. To make the correction use the steps below.

- ⇒ Go to [www.fafsa.gov](http://www.fafsa.gov)
- ⇒ Click on “Login.”
- ⇒ Enter the student’s name, social security number, and date of birth and click “Next.”
- ⇒ Select the 2018/2019 FAFSA and click on “Make FAFSA Corrections.”
- ⇒ Enter the Student’s FSA ID and password and click “Next.”
- ⇒ Navigate to the “Financial Information” section of the FAFSA.
- ⇒ Update the filing status of your and/or your parents IRS income tax return. Make sure “Already completed” is selected and click “Next.”
- ⇒ You will be presented with a series of questions that will determine your eligibility to use the Data Retrieval Tool. Once you are presented with the option to enter your FSA ID and “Link to IRS” complete the information and click “Link to IRS.” You then will be directed to the IRS website.
- ⇒ Once on the IRS website, enter the requested information as it appears on your tax return. If the IRS is able to validate your identification your tax information will be displayed. Select “Transfer My Tax Information into the FAFSA” and then click on “Transfer Now.”
- ⇒ You will be re-directed back to FAFSA.
- ⇒ **When completed proceed to the Sign and Submit section of FAFSA and submit your corrections “SUBMIT MY FAFSA NOW”**

## Tax Return Transcript AND Verification of Non-Filing from the IRS

<p style="text-align: center;"><b>Verification of Non-Filing</b></p> <p>A non-filer is any Student or Parent (not filing a joint return) who did not work or did work, but did not file a <b>2016</b> Federal Income Tax Return. For the 2018-2019 academic year any parent or independent student who is a Non-Filer is required to provide a Verification of Non-Filing Letter from the IRS and all <b>2016</b> W2(s) from each employer. A request to the IRS for a Verification of Non-Filing Letter can be made using the IRS “Get Transcript Online” tool at <a href="http://www.irs.gov/Individuals/Get-Transcript">www.irs.gov/Individuals/Get-Transcript</a> or by submitting IRS Form 4506-T and checking box 7.</p>	<p style="text-align: center;"><b>Request Transcript Online</b></p> <p>Go to <a href="http://WWW.IRS.GOV">WWW.IRS.GOV</a>          Select “<b>Get My Tax Record</b>”          Under Tools select <b>Get a Transcript Online or by Mail</b>          Follow prompts: Make sure to request Tax Return Transcript for year <b>2016</b>.          You should receive your transcript in 5-10 business days.</p>
<p style="text-align: center;"><b>Transcript by Mail</b></p> <p>Complete Form 4506-T (Request for Transcript of Tax Return)          Form 4506-T is available online at <a href="https://www.irs.gov/pub/irs-pdf/f4506t.pdf">https://www.irs.gov/pub/irs-pdf/f4506t.pdf</a></p>	<p style="text-align: center;"><b>Transcript By Phone</b></p> <p>Call the IRS at 1-800-829-1040          Follow prompts: Option 2 (personal income taxes)                                    Option 1 (tax history)                                    Option 2 (Tax Return Transcript)          Enter and Verify Social Security number(s)          Enter and Verify street address          Press 2 for Tax Transcript and indicate which year: <b>2016</b></p>