



## Verification Worksheet – V5 Dependent 2021-22 Academic Year

**Student Name:** \_\_\_\_\_ **ID:** \_\_\_\_\_

Last First SSN or Puget Sound ID

Your FAFSA was selected by the U.S. Department of Education for a review process called “Verification.” We are required by federal law to verify that the data provided on your FAFSA is accurate. If there are any discrepancies between your FAFSA and information provided on this worksheet, we will update your application, recalculate your aid eligibility, and notify you of any changes to your financial aid package.

This worksheet and any additional documentation required should be returned to Student Financial Services as soon as possible. All required documentation must be submitted and reviewed before verification can be completed.

**Verification must be completed before your financial aid can be applied to your student account and no later than the end of the first term of enrollment for the academic school year.** If verification is not completed, all academic year federal, state, and need-based Puget Sound aid will be canceled.

### A. Family Information

**List the people in your parents’ household, including:**

- Yourself and your parent(s). If your parents are divorced, include only the parent you primarily live with. If your primary parent has remarried, include your step-parent.
- Your parents’ other children, if (a) your parents will provide more than half of their support from July 1, 2021 - June 30, 2022, or (b) the other children would be required to provide parental information if they were completing a 2021-2022 FAFSA. Include children who meet either standard, even if they do not live with your parent(s).
- 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 - June 30, 2022.

Provide the college name for any household member (besides your parents) who will be attending college at least half-time between July 1, 2021 and June 30, 2022 and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship	College 2021-2022
		Self	University of Puget Sound
		Parent	Not Applicable
		Parent / Step-parent	Not Applicable
		Sibling	
		Sibling	

## B. Student 2019 Tax and Income Information

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Check only **ONE** box below:

- Check here if you did not earn any income and were not required to file a 2019 U.S. Income Tax Return.
- Check here if you filed a 2019 U.S. Income Tax Return and used the IRS Data Retrieval Tool (DRT) to transfer your 2019 IRS U.S. Income Tax Return information into your FAFSA (Data Retrieval Tool instructions below if needed).
- Check here if you filed a 2019 IRS U.S. Income Tax Return but are unable to or choose not to use the IRS Data Retrieval Tool (DRT) to transfer your 2019 IRS U.S. Income Tax Return information into your FAFSA and instead have attached a signed copy of your 2019 Income Tax Return and Schedules 1-3 or a 2019 IRS issued Tax Return Transcript.
- Check here if you filed an Amended 2019 U.S. Income Tax Return and have attached a signed copy of your 2019 IRS 1040X Form "Amended U.S. Individual Income Tax Return" which was filed with the IRS.  
*You must also provide **one** of the following:*
- ✓ Signed copy of your original 2019 Income Tax Return and Schedules 1-3 that were filed with the IRS.
  - ✓ 2019 IRS issued Tax Return Transcript from the original form you filed.
- Check here if you earned income and received a 2019 W-2, but were not required to file a 2019 Tax Return.  
*You must provide the following documentation:*
- ✓ Copy of your 2019 IRS Form W-2 for each source of employment.
- Check here if you earned income but did not receive a 2019 W-2 and were not required to file a 2019 Tax Return.  
✓ List below your employer(s) and income received in 2019:

Source of Income / Employer's Name	Amount Earned in 2019
	\$
	\$

## C. Parent 2019 Tax and Income Information

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Check only **ONE** box below:

- Check here if you filed a 2019 U.S. Income Tax Return and used the IRS Data Retrieval Tool (DRT) to transfer your 2019 U.S. Income Tax Return information into your student's FAFSA (Data Retrieval Tool instructions below if needed).
- Check here if you filed a 2019 IRS U.S. Income Tax Return but are unable to or choose not to use the IRS Data Retrieval Tool (DRT) to transfer your 2019 IRS U.S. Income Tax Return information into the FAFSA and instead have attached a signed copy of your 2019 Income Tax Return and Schedules 1-3 or a 2019 IRS issued Tax Return Transcript.
- Check here if you filed an Amended 2019 U.S. Income Tax Return and have attached a signed copy of your 2019 IRS 1040X Form "Amended U.S. Individual Income Tax Return" which was filed with the IRS.  
*You must also provide **one** of the following:*
- ✓ Signed copy of your original 2019 Income Tax Return and Schedules 1-3 that were filed with the IRS.
  - ✓ 2019 IRS issued Tax Return Transcript from the original form you filed.

### C. Parent 2019 Tax and Income Information (continued)

Check here if you did not earn any income and were not required to file a 2019 IRS U.S. Income Tax Return.

You must provide the following documentation:

- ✓ "Verification of Non-Filing Letter" from the IRS attesting that you did not file a 2019 IRS U.S. Income Tax Return. You can obtain this online at <https://www.irs.gov/get-transcript> IRS Form 4506-T and mark box #7.

Check here if you earned income and received a 2019 W-2, but were not required to file a 2019 Income Tax Return.

You must provide the following documentation:

- ✓ Copy of your 2019 IRS Form W-2 for each source of employment.
- ✓ "Verification of Non-Filing Letter" from the IRS attesting that you did not file a 2019 IRS U.S. Income Tax Return. You can obtain this online at <https://www.irs.gov/get-transcript> IRS Form 4506-T and mark box #7.

Check here if you earned income but did not receive a 2019 W-2 and were not required to file a 2019 Tax Return.

You must provide the following documentation:

- ✓ "Verification of Non-Filing Letter" from the IRS attesting that you did not file a 2019 IRS U.S. Income Tax Return. You can obtain this online at <https://www.irs.gov/get-transcript> IRS Form 4506-T and mark box #7.
- ✓ List below your employer(s) and income received in 2019:

Source of Income / Employer's Name	Amount Earned in 2019
	\$
	\$

### D. High School Completion Status

Provide one of the following documents to indicate the student's high school completion status at the time the student will begin college in 2021–2022:

- 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 copy of the student's General Educational Development (GED) certificate or GED transcript.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If the student completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- If state law requires a homeschooled 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.
- If state law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (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 documents the successful completion of a secondary school education in a homeschool setting.

## E. Identity and Statement of Educational Purpose

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(This entire section must be completed in person in our Student Financial Services office)

### Verification of Identity

The student must appear in person at the University of Puget Sound 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.

### Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and  
(Print Student's Name)

that the Federal student financial assistance that I may receive will only be used for educational purposes and to pay the cost of attending the University of Puget Sound for 2021-2022.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's UPS ID Number)

## F. Instructions for Providing 2019 Tax Return Data

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Schools must verify FAFSA data with information provided directly from the IRS. If you checked that you filed a 2019 Income Tax Return, you must provide your 2019 IRS tax data to us using one of the following 3 options: the IRS Data Retrieval Tool through the FAFSA, a copy of your 2019 Income Tax Return and Schedules 1-3 signed and dated, or an IRS issued 2019 Tax Return Transcript. Please see instructions below for each option.

**NOTE:** If you are married and you and your spouse filed separately on your 2019 U.S. Income Tax Return, you must provide either a 2019 IRS Tax Return or 2019 IRS Tax Return Transcript for both of you in order to complete verification.

**Option 1: IRS Data Retrieval Tool – FAST–EASY–ACCURATE** (You do not need to transfer again if already completed)  
The easiest way to verify your FAFSA data with accurate tax information is by using the IRS Data Retrieval Tool:

- ✓ Log in at [www.FAFSA.gov](http://www.FAFSA.gov)
- ✓ Click **Make FAFSA Corrections** located in the middle of the page.
- ✓ In the Financial Information section, answer the eligibility questions and click **Link to IRS**.
- ✓ **Proceed to IRS Site**, enter the requested information, and click **Submit**
- ✓ Review information retrieved from your tax return and click **Transfer Now**
- ✓ Complete the process on the Sign and Submit tab of your FAFSA

**Option 2: Tax Return** - If you do not want to or are not eligible to use the IRS Data Retrieval Tool, you can provide a signed and dated copy of your 2019 Income Tax Return and Schedules 1, 2, and 3 along with this verification worksheet.

## F. Instructions for Providing 2019 Tax Return Data (continued)

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**Option 3: Tax Return Transcript** - If you do not want to or are not eligible to use the IRS Data Retrieval Tool, you can provide a 2019 IRS issued Tax Return Transcript along with this verification worksheet.

Tax filers can request a free transcript of their 2019 tax return from the IRS by:

Telephone:

- ✓ Automated Telephone Request – 1-800-908-9946
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

Get Transcript by Mail

- ✓ <https://www.irs.gov/get-transcript>
- ✓ Click "Get Transcript by Mail"
- ✓ Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the online request.

Get Transcript Online

- ✓ <https://www.irs.gov/get-transcript>
- ✓ Click "Get Transcript Online."
- ✓ Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- ✓ To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan).
- ✓ Transcript displays online upon successful completion of the IRS's two-step authentication.

Paper Request Form:

- ✓ IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

## G. Certification and Signatures

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Each person signing this form certifies that all of the information reported on it is complete and correct. The student and at least one parent must sign and date. Please use a pen to complete, electronic or typed signatures are not acceptable.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## H. Submission Instructions

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- Please use one of the following options to submit your completed paperwork to SFS (originals are *not* required):
  - Attachment via Email: [sfs@pugetsound.edu](mailto:sfs@pugetsound.edu)
  - Fax: 253-879-8508
  - Mail: Student Financial Services 1500 N. Warner Street #1039 Tacoma, WA 98416

Warning: If you purposely give false or misleading information on this form, you may be subject to a fine, imprisonment, or both.