



# Financial Aid Office

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Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "Verification". Section 34 CFR 668.54 of the Federal law says that before awarding Federal aid, we have the right to ask you to confirm information reported on your FAFSA using this worksheet, you and/or your spouse's 2017 tax return transcripts, and/or other documents as needed. If there are any differences, your FAFSA information will be corrected.

You and/or your spouse must complete this worksheet.

Complete this verification request as soon as possible to prevent delays in the receipt of your financial aid award.

## NOTICE ABOUT INCOME VERIFICATION

Income information for tax filers must be matched with the data on file with the Internal Revenue Service (IRS). See page 2 of this form.

As such, persons who have not filed 2017 taxes will not be able to complete the verification until they have filed and their tax information is available from the IRS.

Availability of information for online IRS Data Retrieval or IRS Tax Return Transcripts can take up to 2 weeks of filing taxes electronically and up to 8 weeks following paper tax filing.

### A. Student Information

Last Name	First Name	M.I.	MCNY ID#
Street Address (include Apt. no.)		Date of Birth	
City	State	Zip Code	Phone Number (include area code)

### B. Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2019 through June 30, 2020, or if the child will be required to provide your information when completing a 2019-2020 FAFSA. Include children who meet either of these standards, even if they do not live with you.
- Other people if they now live with you and you provide more than half their support and will continue to provide more than half of their support through June 30, 2020.
- Provide college information for 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, 2019, and June 30, 2020, and include the name of the college. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Martin Jones (example)</i>	<i>28</i>	<i>Husband</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>	MCNY	

**Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.**

**Important Income Information for 2017 Tax Filers**

The **IRS Data Retrieval Tool** allows students and/or parents to access the 2017 IRS tax return information needed to complete the 2019-2020 Free Application for Federal Student Aid (FAFSA), and transfer the data directly into their FAFSA from the IRS Web site. If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool for several reasons:

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA has accurate tax information.
3. You won't need to provide a copy of your or your parents' tax returns to your college.

**Using the IRS Data Retrieval Tool on [www.FAFSA.gov](http://www.FAFSA.gov)**

- Go to [www.FAFSA.gov](http://www.FAFSA.gov), log in and select "Make FAFSA Corrections," and navigate to the student and/or spouse financial sections.
- If eligible to complete the process, use the IRS Data Retrieval to transfer 2017 IRS income tax information to the FAFSA.
- When using the IRS Data Retrieval, do not modify income data after transferring it to the FAFSA. If you allow the data to be transferred from the IRS Data Retrieval Tool to the FAFSA without modification, the transferred data will not be subject to verification. This will reduce the likelihood that your FAFSA will be selected for verification, potentially saving you time and hassle. If you modified any of the transferred data, an **IRS Tax Return Transcript** option will be required.

**How to Request a 2017 IRS TAX RETURN TRANSCRIPT:** If you and/or your spouse are unable or choose not to use the IRS Data Retrieval Tool, IRS Tax Return Transcript(s) will be required.

- Go to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) and get transcript online or by mail; make sure to request a *2017 Tax Return* Transcript(s) for you and/or your spouse.
- SSN, date of birth, and address used on the taxes are needed for each tax filer when making the request.
- Married persons filing separate tax returns must use Transcript option to request tax info for both student and/or spouse.
- IRS Tax Return Transcripts must be submitted with this verification worksheet.
- If you and/or your spouse filed amended return(s), submit the signed original tax return(s) or tax transcript(s) and signed 1040X(s).

**C. Student's (and Spouse's, if married) Income Information**

Have you (and spouse) filed a 2017 Federal Income Tax Return?

- YES...** Attach a copy of your (and spouse's) **2017 Federal Tax Return Transcript from the IRS** (*NOT a copy of 1040 Federal Tax Return filed*).
- YES...** I used the IRS Data Retrieval Tool on [www.FAFSA.gov](http://www.FAFSA.gov) to transfer my (spouse's) tax income information
- NO...** If you and/or spouse are not required or did not file a 2017 Federal Income 1040 Tax Return, you must complete the table below and attach copies of ALL 2017 W-2 forms and **Verification of 2017 Non-Tax Filing Letter** from [irs.gov](http://irs.gov).

Table C		
Employer's Name	2017 Amount Earned	IRS W-2 Attached (Yes or No?)
	\$	
	\$	
	\$	
	\$	

**Important Income Information for 2017 Non-Tax Filers**

All **NON-TAX FILERS** are required to provide an **IRS Verification of Non-Filing Letter** dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS. An IRS Verification of Non-filing Letter can be obtained online at <https://www.irs.gov/individuals/get-transcript> using the IRS Get Tax Transcript service. If you cannot request it online, it must be obtained from the IRS using **Form 4506-T**, Request for Transcript of Tax Return, and **checking box 7**.

Please note that Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.

**\*\*\*DO NOT list Metropolitan College of New York (MCNY) as a third party to receive the Tax Transcript.\*\*\*** It will be difficult for our mailroom and Financial Aid Office to match an incoming IRS Tax Return Transcript to the aid applicant (student), as the names may be different.

**D. Certification and Signatures**

By signing this worksheet, we certify that all information reported is complete and correct. If married, spouse's signature is optional

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

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

\_\_\_\_\_  
Date

**Submit this worksheet to the Financial Aid Office.**

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

**You should make a copy of this worksheet for your records.**