

**2021-2022 Verification Worksheet – Dependent**

Please make sure all forms and documents are signed and include your SLU Banner ID number.

Your application was selected for review in a process called "Verification." In this process, Saint Louis University will compare information from your FAFSA with this worksheet and financial data you must submit. The law requires completion of Verification before awarding and/or disbursing federal aid. **If** there are differences between your FAFSA application and your verification documentation, electronic corrections to your FAFSA may be required. You may contact Saint Louis University at (314) 977-2350 if you have questions or by Email: [sfs@slu.edu](mailto:sfs@slu.edu).

**INSTRUCTIONS**

- Complete all sections of this worksheet in **full**.
- If you or your parent(s) have filed a 2019 Federal Income Tax Return with the IRS:
  - Log on to [studentaid.gov](http://studentaid.gov) and use the IRS Data Retrieval Tool to transfer your 2019 tax information to your 2021-2022 FAFSA.
  - For instructions: (see attached pages)
- If your parent(s) was/were not required to file a 2019 Federal Income Tax Return with the IRS:
  - Attach a signed copy of parent 2019 Verification of Non-Filing Letter with the student name and SLU Banner ID on it.
  - For instructions: (see attached pages)
- Saint Louis University recommends completion of the verification process within 30 days after receiving notice, or by June 30, 2021 at the latest. Completing the process after this date, may result in you not being considered for competitive scholarships and other aid opportunities including Federal SEOG and Federal Perkins loans. You may also be required to make payments towards your account balance until your aid eligibility can be determined.
- Please Submit Documents:** Saint Louis University, One Grand Boulevard DuBourg Hall, Room 119, St. Louis, MO. 63103 **OR** Fax: (314) 977 – 3437/Email: [sfs@slu.edu](mailto:sfs@slu.edu)

**NOTE:** Due to imaging system requirements, photographs of documents are not acceptable.

**A. Student Information**

Last Name	First Name	M.I.	SLU Banner ID Number
-----------	------------	------	----------------------

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

Full Name	Age		
Write the names of the people in your parent(s)' household in the chart below:	Write the age of each family member in the chart below.		
1. Include <b>yourself</b> .			
2. Include <b>your parent(s)</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 <i>more than half</i> of your support during the last twelve months.</li> <li><i>If your parent is remarried</i>, include step-parent.</li> <li><i>If your parents are unmarried but live together</i>, list Parent #1 and Parent #2.</li> </ul>			
3. Include your <b>parent(s)' other children</b> , if your parents provide <i>more than half</i> of their support between July 1, 2021 and June 30, 2022 or if the children would be required to provide parental information if they were completing a 2021-21FAFSA.			
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, 2022.			
Full Name	Age	Relationship	College
<b>(EXAMPLE)</b> Tom Jones	18	Brother	ABC University
		Self	Saint Louis University
Parent 1			DO NOT USE
Parent 2			DO NOT USE

**C. Dependent Student's Information (all applicants) SLU Banner ID Number:****1. Check the box that applies:**

- a. ☐ I filed a 2019 Federal IRS Tax Return, Puerto Rican, or Foreign Income Tax Return, and have used the IRS Data Retrieval Process on my FAFSA **OR** enclosed either an IRS Tax Return Transcript or SIGNED Tax Return.
- b. ☐ I was not employed, did not have income and was not required to file a 2019 Federal IRS Tax Return.
- c. ☐ I was employed and had income, but was not required to file a 2019 Federal IRS Tax Return:
- **Complete the chart below:** list employer(s) (include Saint Louis University) and the amount that was earned in 2019
  - **Attach copies of all 2019 W-2 and 1099 Forms.**

<b>COMPLETE CHART ONLY IF BOX c ABOVE IS CHECKED</b>	Non-Tax Filers with 2019 earnings are federally required to submit a copy of W-2(s) from each employer to Saint Louis University with this form.				
	Name of Employer	Amount Earned in 2019	2019 W-2 and 1099 Forms received from employer?		2019 W-2 and 1099 Forms attached to this Form?
		\$	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>
		\$	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>
		\$	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>

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

**Note: If you lost or never received a W2, contact employer****D. Parent(s)' Information****1. Check the box that applies:**

- a. ☐ I filed a 2019 Federal IRS Tax Return, Puerto Rican, or Foreign Income Tax Return, and have used the IRS Data Retrieval Process on my FAFSA **OR** enclosed either an IRS Tax Return Transcript or SIGNED Tax Return.
- b. ☐ I was not employed, did not have income and was not required to file a 2019 Federal IRS Tax Return.
- 📎 **Submit a 2019 IRS Verification of Non-Filing Letter.** Order a free Verification of Non-Filing Letter at [irs.gov](https://www.irs.gov).  
(See Attached Pages)
- c. ☐ I was employed and had income, but was not required to file a 2019 Federal IRS Tax Return:
- 📎 **Complete the chart below:** list employer(s) and the amount that was earned in 2019
- 📎 **Attach copies of all 2019 W-2 and 1099 Forms.**
- 📎 **Submit a 2019 IRS Verification of Non-Filing Letter.** Order a free Verification of Non-Filing Letter at [irs.gov](https://www.irs.gov).  
(See Attached Pages)

<b>COMPLETE CHART ONLY IF BOX c ABOVE IS CHECKED</b>	Non-Tax Filers with 2019 earnings are federally required to submit a copy of W-2(s) from each employer to Saint Louis University with this form.				
	Name of Employer	Amount Earned in 2019	2019 W-2 and 1099 Forms received from employer?		2019 W-2, 1099s and Non- Filing Letter attached?
		\$	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>
		\$	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>
		\$	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>

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

**Note: If you lost or never received a W-2, contact employer****E. Signature. Manually sign with a ballpoint pen.****\*Forms with digital/electronic/typed signatures cannot be accepted and will be returned.**

Each person signing certifies that all the information reported is complete and correct. The student and at least one parent whose information was reported on the 2021-2022 FAFSA must sign and date this worksheet.

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

Date \_\_\_\_\_

Parent's Signature \_\_\_\_\_

Date \_\_\_\_\_

Parent Daytime Phone Number (include area code): (                      )

**Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced**

## Instructions for Obtaining 2019 IRS Tax Information

Information Included Below is for Information Purposes Only – Need Not Be Submitted with Pages Above to Student Financial Services

### FAFSA IRS Data Retrieval Tool ★ Recommended ★

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to [studentaid.gov](https://studentaid.gov) and select Login.
- Select "Make FAFSA Corrections"
- Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



**IMPORTANT: If you use the Data Retrieval Tool to link your tax information, please do not submit paper copies of Tax Return Transcripts unless requested by the Financial Aid Office.**

### 2019 IRS Tax Filer & Don't Want to Use the Data Retrieval Tool?

If you are unable to use the Data Retrieval Tool, or you choose not to, you must submit a paper copy of all required Tax Return Transcript(s).  
[www.irs.gov](https://www.irs.gov)

#### Options for Getting Your IRS Tax Return Transcript

<https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them>

**Current IRS Users – Online Request:** (Only if you have created an online account previously)

- Go to [www.irs.gov](https://www.irs.gov)
- Under the table on the IRS homepage, select "Get Your Tax Record".
- Select "Get Transcript by Mail". Then, Follow on-screen prompts.
- Ensure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

**New IRS Users – Online Request to Receive via U.S. Mail:** (If 1<sup>st</sup> Time User to IRS Account)

- Go to [www.irs.gov](https://www.irs.gov)
- Under the table on the IRS homepage, select "Get Your Tax Record".
- Select "Get Transcript by Mail". Then, Follow on-screen prompts.
- Ensure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

**Telephone Request:** 1-800-908-9946 & Request 2019 IRS Tax Return Transcript

- Your IRS Tax Return Transcript is mailed to the address used to file your 2019 Federal Tax Return; Typically Received in 7-10 business days.
- Then, send a **copy** to Student Financial Services (See Section D Above)

#### Option for Submitting a Signed/ Dated Copy of a 2019 Federal Tax Return

- If an IRS Tax Return Transcript cannot be obtained, SLU accepts signed copies of 2019 income tax returns as acceptable documentation to verify FAFSA/ISIR income and tax return information.

## Tax Filers with Special Circumstances

**Individuals Granted a Filing Extension by the IRS** - Provide the following documents:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019;
- Confirmation of non-filing from the IRS dated on or after October 1, 2021 (*See Instructions for Verification of Non-Tax Filing Status Below*).
- A copy of IRS Form W-2(s) for each source of 2019 employment income received or an equivalent document; and
- If self-employed, a signed statement certifying the amount of AGI and U.S. income tax paid for tax year 2019.

**Individuals Who Filed an Amended IRS Income Tax Return** - Provide a copy of the original IRS tax return transcript (If IRS DRT not used) **and** a signed copy of the IRS Form 1040X.

**Individuals Who Were Victims of Tax Administration Identity Theft** - Call the IRS at 1-800-908-4490. In addition, you must provide a signed statement indicating that you were a victim of tax-related identity theft. Please contact Student Financial Services for more information & guidance.

**Individuals Who Filed Non-U.S. Income Tax Returns** - A transcript obtained, at no cost, from a government of a U.S. territory or commonwealth, or a foreign central government that includes all the tax filer's income and tax information required to be verified for the tax year. If the transcript cannot be obtained at no cost, a signed copy of the applicable tax return(s).

## Non-Tax Filer & Verification of Non-Tax Filing Status

**Telephone Request:** Call 1-800-908-9946 & Request Verification of 2019 Non- Tax Filing Status

- A letter is mailed to your address verifying your request, typically within 7-10 business days.
- Then, send a **copy of all pages included** to Student Financial Services.

**Paper Request:** Complete the IRS Form - [4506-T](#). Then, mail all requested information to the IRS.

- A letter is mailed to your address verifying your request. See #7 on 4506-T Form "Verification of Non Filing" (**Note: Approximate Processing Time = 10 business days upon receipt of 4506-T at IRS**).
- Then, send a **copy of all pages included** to Student Financial Services.

## Acceptable documentation for Verification of Nonfiling "in-lieu" of IRS confirmation

- **Nontax Filers (Parents of Dependent Students)** who did not file and are not required to file an income tax return for the 2019 tax year **AND** after following steps above are not able to receive documentation from the IRS for Verification Nonfiling:

Provide a signed/dated statement certifying that the parent(s) attempted to obtain **Verification of Nonfiling** from the IRS and was unable to obtain the required documentation and has not filed and is not required to file a 2019 income tax return.

Note: If Not Completed in Section C – Page 2, Parent(s) must include a listing of each source of income received for 2019 and provide a copy of an IRS Form W-2, or equivalent document for each source of income.

2019 FEDERAL INCOME TAX FILING REQUIREMENTS				
Tax filing requirements may be found in the IRS Form 1040 instruction book.  The amounts listed are for individuals under the age of 65.	For most people, a tax return must be filed with the IRS if their 2019 income was at least:			
	<b>Single dependent student</b> (someone else can claim you)	<b>\$12,200</b> Earned Income	<b>Married - filing separately</b>	<b>\$5</b> Gross Income
	<b>Single, if claiming self</b>	<b>\$12,200</b> Gross Income	<b>Head of household</b>	<b>\$18,350</b> Gross Income
	<b>Married – filing joint return</b>	<b>\$24,400</b> Gross Income	<b>Qualifying widow(er) with dependent</b>	<b>\$24,400</b> Gross Income