SAINT LOUIS UNIVERSITY™

STUDENT FINANCIAL SERVICES

One Grand Blvd.
DuBourg Hall, Room 121
Saint Louis, MO 63103

Phone: 314-977-2350
Fax: 314-977-3437
Email: SFS@SLU.edu

2018-2019 Verification Worksheet - Independent

Student's Name____ SLU Banner ID Number__________________

Your student aid application was selected for review by the U.S. Department of Education. Saint Louis University is required by federal law to compare your application with information on this worksheet and with your 2016 federal tax documents. This includes spouse's information if married and parents' information if you are considered dependent for federal aid purposes.

Once verification is complete, necessary corrections will be submitted to the Central Processing System and you will receive an amended Student Aid Report (SAR) including required adjustments to your Expected Family Contribution (EFC). You may review changes to your offered awards on mySLU.

Saint Louis University recommends completion of the verification process by June 30, 2018. Completing the process after this date, may result in you not being considered for Saint Louis University 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.

The final deadline to complete the verification process is established by the Federal government and published in the Federal Register on an annual basis – www.federalregister.gov/.

A. Family Information

List the name and age of all household members (as defined below). Also include the name of the college for household members, excluding your parent(s), who will be enrolled, at least half time, in a degree, diploma, or certificate program at a post-secondary educational institution any time between July 1, 2018 and June 30, 2019.

Independent Student:

- Yourself
- Your spouse (if applicable)
- Your or your spouse's children, if you or your spouse will provide more than half of their support from July 1, 2018 through June 30, 2019, even if a child does not live with you.
- Other people if they now live with you and you or your spouse will provide more than half of their support through June 30, 2019.

Full Name	Age	Relationship to Student	Attending College	Name of the College If enrolled at least half-time during 2018-19.
		Self	❑ Yes ❑ No	Saint Louis University
			❑ Yes ❑ No	
			❑ Yes ❑ No	
			❑ Yes ❑ No	
			❑ Yes ❑ No	
			❑ Yes ❑ No	

If more space is needed to provide information requested, please provide a separate page that includes the student's name and ID number at the top.

Sign and Date This Worksheet

By signing, I certify that all of the information reported and/or attached is complete and correct. **WARNING**: If you purposely provide misleading information or withhold information, you may be subject to penalty of law and/or institutional sanctions.

____ ________________________

Student Signature Date

NOTE: Signatures must be handwritten. Computer fonts not acceptable

Please indicate below which process has been completed:

Student **Spouse**

______ ______ IRS Data Retrieval Process when completing the FAFSA **(Section B – Not Required)**

______ ______ Enclosed a tax transcript from the IRS *(directions to request transcript(s) are included)* **(Section B – Not Required)**
(Copies of 1040 Federal Tax Return is no longer acceptable documentation)

______ ______ Will **not** file a 2016 Federal Tax Return – **Complete Non-Filer Section BELOW and attach W-2 form(s)**

B. Student/ Spouse Non-Filer(s)

Independent Student	
Were you (the student) employed at any time during 2016?	❑ Yes ❑No
Was your spouse employed at any time during 2016?	❑ Yes ❑No ❑I am not married

If you, or your spouse, were employed in 2016 and did not file a tax return, list the income received from all employers (even if no W-2 was issued). Please attach copies of all W-2's received. **YOU MUST ALSO PROVIDE VERIFICATION OF NON-FILING STATUS**. Instructions are available below or on the IRS website at: https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them.

Name of Non-Filer	Employer or Source of Income	2016 Income	W-2 Attached
			❑ Yes ❑ No
			❑ Yes ❑ No
			❑ Yes ❑ No
			❑ Yes ❑ No
			❑ Yes ❑ No
			❑ Yes ❑ No

If more space is needed to provide information requested, please provide a separate page that includes the student's name and ID number at the top.

I/we certify that I/we did not and were not required to file a 2016 Federal income tax return (or foreign tax return) and that all of the information reported is complete and accurate. **WARNING**: If you purposely provide misleading information or withhold information, you may be subject to penalty of law and/or institutional sanctions.

__________________________________ __________________________________
Student's Signature *Date* *Spouse's Signature (if applicable)* *Date*

NOTE: Signatures must be handwritten. Computer fonts not acceptable

Sign and Date This Worksheet

By signing, I certify that all of the information reported and/or attached is complete and correct. **WARNING:** If you purposely provide misleading information or withhold information, you may be subject to penalty of law and/or institutional sanctions.

__________________________________ __________________________________
Student Signature Date Spouse's Signature (If Applicable) Date

NOTE: Signatures must be handwritten. Computer fonts not acceptable

C. Submit Documents

Saint Louis University
One Grand Boulevard
DuBourg Hall, Room 121
St. Louis, MO 63103
Fax: (314) 977-3437 Email: sfs@slu.edu

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

Instructions for Obtaining 2016 IRS Tax Return 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 www.fafsa.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.

2016 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***

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
- 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 1st Time User to IRS Account)

- Go to 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 2016 IRS Tax Return Transcript

- Your IRS Tax Return Transcript is mailed to the address used to file your 2016 Federal Tax Return; Typically Received in 7-10 business days.
- Then, send a **copy** to Student Financial Services *(See Section D Above)*

Tax Filers with Special Circumstances

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

- A copy of IRS Form 4868,3 ''Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,'' the individual filed with the IRS for tax year 2016;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2016;
- Confirmation of non-filing from the IRS dated on or after October 1, 2017 *(See Instructions for Verification of Non-Tax Filing Status Below).*
- A copy of IRS Form W–2 2 for each source of 2016 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 2016.

Individuals Who Filed an Amended IRS Income Tax Return - Provide a copy of the original IRS tax return transcript ***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-US 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 2016 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 *(See Section D Above)*

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: Processing Time 10 business days upon receipt of 4506-T).

- Then, send a **copy of all pages included** to Student Financial Services *(See Section D Above)*

2016 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 2016 income was at least:			
	Single dependent student (someone else can claim you)	**$6,300** Earned Income	**Married - filing separately**	**$4,000** Gross Income
	Single, if claiming self	**$10,300** Gross Income	**Head of household**	**$13,250** Gross Income
	Married – filing joint return	**$20,600** Gross Income	**Qualifying widow(er) with dependent**	**$16,600** Gross Income