2019-2020 Independent Student Verification Worksheet

Student Name: ___________________________  Kent State ID Number: ___________________________

Permanent Address:  _________________________________________________________________________

Phone Number: __________________________  Preferred Email: ______________________________

Submit all requested information to the Kent State University One Stop for Student Services using one of the following options:

- Mail: One Stop for Student Services, Kent State University, P.O. Box 5190, Kent, Ohio 44242-0001
- Fax: 330-672-6001
- Online using the Contact Us form at kent.edu/onestop
- In Person: One Stop for Student Services, 1st floor, University Library (Kent Campus) or Regional Campus Financial Aid Office

Deadline to Submit:

- In order to be considered for the Federal Pell Grant: Deadline is 120 days after the student’s last date of attendance during the 2019-2020 academic year or September 18, 2020, whichever comes first.
- To be considered for all other federal aid programs, including Federal Direct Student Loans and the Federal PLUS Loan, the deadline is 30 days prior to the end of the last semester the student attends during the 2019-2020 academic year.

SECTION 1: STUDENT HOUSEHOLD INFORMATION

List the people in your household. Include yourself; your spouse; your children if you will provide more than half their support through June 30, 2020; and any other people that now live with you if you will continue to provide more than half their support through June 30, 2020. Include everyone in the household.

<table>
<thead>
<tr>
<th>First and Last Name of Household Member</th>
<th>Date of Birth</th>
<th>Relationship to Student</th>
<th>Will this person live in your household through June 30, 2020?</th>
<th>Will you support this person at least 51% through June 30, 2020?</th>
<th>Name of college they will attend at least half time during 2019-2020 (if applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
<td>□ Yes □ No</td>
<td>□ Yes □ No</td>
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<td>□ Yes □ No</td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

Attach additional sheet of paper if necessary
SECTION 2: STUDENT TAX FILING STATUS

Select the student (and spouse if applicable) federal tax filing status: Select ONE.

☐ I am not married. I did not work in 2017. I did not and will not file a 2017 federal tax return.

*You must submit the following:*
1. IRS Non-Filing Letter for the student

☐ I am not married. I completed a 2017 federal tax return.

Select one option below:
☐ I used the IRS Data Retrieval Tool on the FAFSA. Date used: ______________________
☐ I will submit a signed copy of my 2017 Federal Tax Return or IRS Tax Return Transcript

☐ I am not married. I worked in 2017, but I am not required to file a 2017 federal tax return.

*You must submit the following:*
1. Copies of 2017 W-2 forms from all employers
2. IRS Non-Filing Letter for the student
3. List below all your employers and the amount you earned from each in 2017

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>2017 Earnings</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Attach additional sheet of paper if necessary

☐ I am married. We filed a joint 2017 federal tax return or separate tax returns.

Select one option below:
☐ We used the IRS Data Retrieval Tool on the FAFSA. Date used: ______________________
☐ We will submit a signed copy of our 2017 Federal Tax Return or IRS Tax Return Transcript(s)

☐ I am married. Neither I nor my spouse filed a 2017 federal tax return.

*You must submit the following:*
1. IRS Non-Filing Letter for the student
2. IRS Non-Filing Letter for your spouse
3. If you worked, copies of the student and spouses 2017 W-2 forms from all employers
4. If you worked, list below all your employers and the amount you or your spouse earned from each during 2017

<table>
<thead>
<tr>
<th>Student or Spouse</th>
<th>Employer’s Name</th>
<th>2017 Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Student ☐ Spouse</td>
<td></td>
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<tr>
<td>☐ Student ☐ Spouse</td>
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<tr>
<td>☐ Student ☐ Spouse</td>
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</tr>
</tbody>
</table>

Attach additional sheet of paper if necessary
### SECTION 3: UNTAXED INCOME INFORMATION

If a section does not apply, enter a zero.

<table>
<thead>
<tr>
<th>Student</th>
<th>Untaxed Income Information for Calendar Year 2017 Found On 2017 Federal Income Tax Return</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>$_______</td>
<td>Untaxed portions of IRA Distributions reported on 2017 Federal Income Tax Return (Line 15a minus 15b on 1040, or Line 11a minus 11b on 1040a).</td>
<td>$_______</td>
</tr>
<tr>
<td>☐ Rollover</td>
<td>Check the box if this was a rollover.</td>
<td>☐ Rollover</td>
</tr>
<tr>
<td>$_______</td>
<td>Untaxed portions of Pension &amp; Annuities reported on 2017 Federal Income Tax Return (Line 16a minus 16b on 1040, or Line 12a minus 12b on 1040a).</td>
<td>$_______</td>
</tr>
<tr>
<td>☐ Rollover</td>
<td>Check the box if this was a rollover.</td>
<td>☐ Rollover</td>
</tr>
</tbody>
</table>

### SECTION 4: SIGNATURES

This form must be signed by the student and spouse (if married).

By signing this application, you hereby affirm that all information reported on this form and any attachment hereto is true, complete, and accurate to the best of your knowledge. If asked by an authorized official, you agree to provide additional proof of information provided on this form. You understand that the Student Financial Aid Office at Kent State University will correct the FAFSA application, as necessary, based on the information submitted. You agree that you understand that if you received federal student aid based on incorrect information, you will need to repay it. You may also be required to pay fines and fees. By signing below, you certify that you (1) will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education, (2) are not in default on a federal student loan or have made satisfactory arrangements to repay it, (3) do not owe money back on a federal student grant or have made satisfactory arrangements to repay it, (4) will notify your college if you default on a federal student loan and (5) will not receive a Federal Pell Grant from more than one college for the same period of time.

_______________________________________________________
Student Signature

_______________________________
Date

_______________________________________________________
Student’s Spouse Signature (if applicable)

_______________________________
Date
SECTION 5: REQUESTING TAX TRANSCRIPTS

Federal Tax Return or IRS Tax Return Transcript
If you filed a 2017 federal income tax return and you did not originally use the IRS Data Retrieval Tool when you filed the FAFSA, you may submit a correction at fafsa.gov and use the tool instead of submitting an IRS Federal Tax Return or Transcript. Some tax filers may not be able to use the IRS Data Retrieval Tool. If that applies to you, submit the IRS Tax Return or Transcript.

A Federal IRS Tax Return Transcript can be obtained online or by mail, free of charge, by visiting irs.gov (click on “Get Your Tax Record”) or by calling 1-800-908-9946. Be sure to request a “Return Transcript” and not an “Account Transcript.” Federal financial aid policies do not allow us to accept a copy of your state tax return.

If you filed an amended tax return for 2017, you must provide a copy of your tax transcript (which will include only information from the original tax return) and a signed copy of the 2017 IRS form 1040X that was filed with the IRS.

If you or your parent/stepparent has a 2017 tax extension beyond the automatic six-month extension, you must submit IRS form 4868 for tax year 2017, a copy of the IRS’s approval of an extension beyond six months, and a copy of all 2017 W-2’s. Additionally, you must submit an IRS Non-Filing Letter dated after October 1, 2018.

If you were a victim of IRS tax-related identity theft and cannot obtain an IRS Tax Return Transcript, you can instead provide a Tax Return DataBase View (TRDBV) Transcript and a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft. You must contact the IRS at 1-800-904-4490 to request a TRDBV Transcript.

If you filed a foreign 2017 tax return or a tax return with Guam, the Northern Mariana Islands, Puerto Rico, or the U.S. Virgin Islands, please contact the One Stop for Student Services for further instructions.

IRS Non-Filing Letter
If you did not file a 2017 federal income tax return and were not required to file a return, an IRS Non-Filing Letter can be obtained online or by mail, free of charge, by visiting www.irs.gov (click on “Get Your Tax Record”) or by calling 1-800-908-9946. To obtain an IRS non-filing letter, individuals must complete the process for requesting a tax transcript as listed above. The IRS will provide a non-filing letter only if a return was not filed.

SECTION 6: WHAT HAPPENS NEXT

1. A financial aid professional will compare information on this worksheet and supporting documentation with the information submitted on the 2019-2020 FAFSA. Allow up to 10 business days for this review.
2. If additional documentation is necessary, Kent State will notify the student via the student’s FlashLine account. A notification will also be sent to the student’s Kent State email account.
3. Kent State will submit any necessary FAFSA corrections necessary to federal processor. The student will receive an updated electronic Student Aid Report.
4. If the student’s financial aid eligibility changes for 2019-2020 as a result of the FAFSA corrections, financial aid awards will be adjusted and the student will be notified via the student’s FlashLine account. A notification will also be sent to the student’s Kent State email account.