

## 2019-20 Independent Verification Worksheet for HSC Students

Your application was selected for review in a process called “verification.” In this process, Temple University will be comparing information from your FAFSA application with copies of your and your spouse’s 2017 Federal Tax Return Transcripts, W2 forms, or other financial documents. The law states we have the right to ask you for this information before awarding Federal aid. If there are differences between your FAFSA application information and your financial documents, you or Temple University may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification worksheet and submit along with all required documents to Student Financial Services (SFS) **immediately**, as Federal and/or University need-based aid awarded is estimated until this process is complete. Failure to complete verification in a timely manner may lead to cancellation of aid. Upon review of the documentation you submit, additional information may be required; notification of such will be made as quickly as possible and may necessitate checking your Temple email account. You will be notified if FAFSA corrections result in changes/cancellation of award(s).

1. Submit the completed 2019-2020 Independent Verification Form. Make sure the form is **SIGNED** by the student. This form is approximately six pages and needs to be filled out completely.
  - If the answer is zero or if the question does not apply to you, write “0”, **do not leave blank**.
2. Submit **2017 IRS Tax Return Transcript(s)** for both student (and spouse), if filed. As per federal regulations, we can no longer accept copies of the filed federal tax return unless it is specifically requested by the SFS office.

### **The only acceptable methods to submit Federal tax information are:**

- **IRS Data Retrieval Tool** (IRS DRT) that is part of FAFSA on the web at [www.FAFSA.ed.gov](http://www.FAFSA.ed.gov). when you originally file your FAFSA.
- **IRS Data Retrieval Tool after you have filed your FAFSA:** Directly import 2017 IRS data into your FAFSA: Log into [www.fafsa.gov](http://www.fafsa.gov), select Make Correction. Choose 2019-20 FAFSA. Click on Financial Information tab. Select Already Completed from drop down box. Enter student or parent FSA ID and click on Link to IRS. Continue to IRS.gov site. Enter Info as requested and submit. Click on box under “Transfer My Tax Information into the FAFSA.” Then click Transfer Now. Transferred data will be encrypted. Remember to electronically sign and submit the FAFSA again.

**OR**

- **IRS Tax Return Transcript:** Submit your 2017 Tax Return Transcript (not a copy of your income tax return). Go to [www.irs.gov](http://www.irs.gov). Click on “Get My Tax Record,” then click “Get a Tax Transcript” or “Get Transcript Online.” Create an account. Select Tax Return Transcript for 2017.
- If you reported information for Schedule C (Profit or Loss from Business), an IRS Tax Return Transcript will be required even with IRS Data Retrieval usage

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

**A. Independent Student's Information**

Student's Last Name	Student's First Name	Student's M.I.	Student's Temple University ID#
Student's Street Address (include apartment number)			Student's Date of Birth
City	State	Zip Code	Student's Phone # (include area code)/Cell

**B. Independent Student's Family Information**

List below the people in your household. Include:

- **Yourself**
- Your spouse (if married)
- Your children, if you will provide more than half of their support from July 1, 2019, through June 30, 2020, or if the children would be required to provide your information if they were completing a FAFSA for 2019-2020.
  - 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 of their support and will continue to provide more than half of their support through June 30, 2020.

*If more space is needed, attach a separate page with the student's name and TUID number at the top.*

Full Name	Age	Relationship	College Attending 7/1/19-6/30/20	Enrolled at least half-time? (Yes/No)
		Self	Temple University	

**C. Independent Student's Income Information to Be Verified**

- Check here if **you were not married** at the time you filed the FAFSA. *[Complete Section D]*

**D. Unmarried Students (As of the time you filed the FAFSA, even if you are now married)**

1. Check only one box below. [Tax transcripts include the 2017 IRS tax return transcript from filing Form 1040, 1040A, 1040EZ, or a tax return from Puerto Rico. Tax transcripts can be obtained by calling the IRS at 1-800-908-9946, or by visiting [www.IRS.gov](http://www.IRS.gov).]
  - Check here if you successfully imported 2017 IRS tax data using the IRS Data Retrieval Tool.
  - Check here if you are attaching your 2017 tax transcript.
  - Check here if you earned income, but did not file a 2017 Federal Income Tax Return, and have attached all 2017 W2 form(s).
    - If you did not file a 2017 Federal Income Tax Return, but earned income in 2017, **you must still provide all W2 forms or other earnings statements to SFS.**
  - Check here if you did not earn any wages or taxable income in 2017.

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

**E. Married Students (As of the time you filed the FAFSA, even if you are no longer married)**

- Check here if you successfully imported 2017 IRS tax data using the IRS Data Retrieval Tool.
- Check here if you are attaching your and (your spouse's) 2017 **joint** tax transcript.
- Check here if you filed **separately** from your spouse and you are attaching 2017 tax transcripts.
- Check here if you and/or your spouse earned income, but did not file a 2017 Income Tax Return.
  - o If you or your spouse did not file a 2017 Federal Income Tax Return, but earned income in 2017, **you must still provide all W2 forms or other earnings statements to SFS.**
- Check here if you and your spouse did not earn any wages or taxable income in 2017.

Employer Name/Sources of Income	Indicate 'Student' or 'Spouse' Income	2017 Income Earned
		\$
		\$
		\$
		\$
		\$

**F. Independent Student's Parent(s) Family Information**

List below the people in your custodial parent(s)' household. Include:

- o **Yourself** and your custodial parent(s) (including a stepparent) even if you don't live with your parent(s).
- o Your custodial parent(s)' other children.
  - o If your parent(s) will provide more than half of their support from July 1, 2019, through June 30, 2020, or if the other children would be required to provide parental information if they were completing a FAFSA for 2019-2020.
  - o Include children who meet either of these standards, even if they do not live with your parent(s).
- o Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2020.

*If more space is needed, attach a separate page with the student's name and TUID number at the top.*

Full Name	Age	Relationship	College Attending 7/1/19-6/30/20 (excluding parents' college)	Enrolled at least half-time? (Yes/No)
		Self	Temple University	

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

**G. Independent Student's Parent(s) Income Information to Be Verified**

1. Check only one box below. Tax transcripts include the 2017 IRS transcript from filing Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico.

*Tax transcripts can be obtained by calling the IRS at 1-800-908-9946, or by visiting [www.IRS.gov](http://www.IRS.gov).*

- Check here if you successfully imported 2017 IRS tax data using the IRS Data Retrieval Tool.
- Check here if you are attaching a copy of your IRS tax return transcript.
- Check here if you earned income, but did not file a 2017 Federal Income Tax Return, and have attached all 2017 W2 form(s).
  - o If you did not file a 2017 Federal Income Tax Return, but earned income in 2017, **you must still provide all W2 forms or other earnings statements to SFS.**
- Check here if you did not earn any wages or taxable income in 2017.

Employer Name/Sources of Income	2017 Income Amount
	\$
	\$
	\$
	\$
	\$
	\$

**H. Student, Spouse and Parent(s) Additional Financial Information and Untaxed Income**

Use the tables below to report annual (not monthly) amounts. If the amount is zero, or the question does not apply to you, write "0." **Do not leave items blank.** This section is directly from the 2019-20 FAFSA.

2017 Additional Financial Information	PARENT(S)	STUDENT'S
Child support <b>paid</b> because of divorce or separation or as a result of a legal requirement. <b>DO NOT include</b> support for children in parent's household.	\$	\$
Grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships ( <b>DO NOT include</b> Temple University scholarships or grants).	\$	\$

2017 Untaxed Income	PARENT(S)	STUDENT'S
Child support <b>received</b> for all children in your household. <b>DO NOT include</b> foster care or adoption payments.	\$	\$

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

Veterans non-education benefits such as Disability Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income not reported elsewhere on this form, such as workers' compensation, disability, etc. Also include the Health and Savings account deduction from IRS form 1040, line 25.  <b>DO NOT include</b> extended foster care benefits, student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on base military housing or a military housing allowance, combat pay, (if you are not a tax filer), benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$	\$

<b>2017 Asset Information</b>	<b>PARENT(S)</b>	<b>STUDENT'S</b>
<b>As of today</b> , what is your (and spouse's) total current balance of cash, savings and checking accounts? <b>DO NOT include</b> student financial aid.	\$	\$
<b>As of today</b> , what is the net worth of your (and spouse's) investments, including real estate?  <b>DO NOT include</b> the home you live in or retirement accounts. Net worth means current value minus debt.	\$	\$
<b>As of today</b> , what is the net worth of your (and spouse's) current businesses and/or investment farms?  <b>DO NOT include</b> a family farm or family business with 100 or fewer full-time or full-time equivalent employees.	\$	\$

**I. Receipt of Supplemental Nutrition Assistance Program (SNAP) Benefits:** (check *one* box below)

- Check here if *no* member of the parents' household (student, parent's children or other individuals that live in the household and receive more than half of the parent's support) received SNAP benefits in calendar year 2017 and/or 2018.

Check here if a member of the parents' household (student, parent's children or other individuals that live in the household and receive more than half of the parent's support) received SNAP benefits in calendar year 2017 and/or 2018. **Please submit documentation from the agency that issued the SNAP benefits in 2017 and/or 2018.**

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

**J. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. If married, spouse's signature is optional.

\_\_\_\_\_  
Student Date

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

\_\_\_\_\_  
Spouse Date

\_\_\_\_\_  
Parent Date

**K. Submit signed and completed Independent Verification Worksheet to the SFS office.**

- SFS highly recommends students **upload signed and completed forms in the 'Student Tools' tab of the TUportal.** It is fast & easy!
- Students may also mail or fax to the appropriate SFS office:

<b>Temple University: HSC Campus</b> Student Financial Services 3340 N. Broad St. Student Faculty Conference Building, LB-41 Philadelphia, PA 19140 215-707-2667 (phone) 215-707-2917 (fax)	<b>Temple University: School of Podiatric Medicine</b> Student Financial Services 8 <sup>th</sup> and Race Streets Philadelphia, PA 19107 215-625-5447 (phone) 215-629-4907 (fax)
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Visit Student Financial Services on the web for more information,  
[www.temple.edu/sfs](http://www.temple.edu/sfs)