

University of La Verne

2021-2022 Verification Worksheet

Office of Financial Aid | 1950 Third Street | La Verne, CA 91750 | Phone: (800) 649-0160 | Fax: (909) 448-1629

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Your 2021-2022 Free Application for Federal Student Aid (FAFSA) was selected for a process called "Verification". The law says that before awarding Federal Student Aid, University of La Verne must compare your FAFSA with the information on the worksheet and other required documents. We cannot process your financial aid until you submit all the required verification documents. Failure to complete the verification process in a timely manner may result in the loss of aid.

SECTION 1: STUDENT INFORMATION

Last Name First Name La Verne ID Number Phone Number

Parental Information: If applicable for dependent students

Last Name First Name Phone Number

SECTION 2: FAMILY INFORMATION

DEPENDENT STUDENTS

Number of Household Members: List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2021, through June 30, 2022, or if the other children would be required to provide parental information if they were completing a FAFSA for 2021–2022. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2022.

INDEPENDENT STUDENTS

Number of Household Members: List below the people in the household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2021, through June 30, 2022, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2022.

Full Name	Age	Relationship	College (if applicable) in 2021-2022*
		<i>Self</i>	<i>University of La Verne</i>

*Number in College: Include 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, 2021, and June 30, 2022, and include the name of the college.

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SECTION 3: STUDENT FINANCIAL INFORMATION FOR 2019 FOR STUDENT TAX FILERS

Important Note: The instructions below apply to the student.

Instructions: Complete this section if the student filed or will file a 2019 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2019 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2019 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules.**

____ Check here if a **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules** is provided.

VERIFICATION OF 2019 INCOME INFORMATION FOR STUDENT NON-TAX FILERS

The instructions and certifications below apply to the student. Complete this section if the student will not file and is not required to file a 2019 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2019.
- The student was employed in 2019 and has listed below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form or an equivalent document is provided.

[Provide copies of all 2019 IRS W-2 forms issued to the student by his/her employers]. List every employer even if the employer did not issue an IRS W-2 form.

Box A: Only complete this box if you worked but did not file taxes.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2019
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

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SECTION 4: VERIFICATION OF 2019 INCOME INFORMATION FOR PARENT TAX FILERS

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2019 or had a change in marital status after December 31, 2019.

Instructions: Complete this section if the parents filed or will file a 2019 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2019 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2019 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules.**

*See Instructions on page 4 on how to obtain your **2019 IRS Tax Return Transcript.**

Did your parent's file separate returns?

If your parents filed separate 2019 IRS income tax returns, the IRS DRT cannot be used and the **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules** must be provided for each.

___ Check here if a **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules** is provided.

SECTION 5: VERIFICATION OF 2019 INCOME INFORMATION FOR INDEPENDENT STUDENTS AND PARENT NON-TAX FILERS

***SKIP THIS SECTION IF YOU FILED TAXES IN 2019**

The instructions and certifications below apply to the Independent student's spouse. It also applies to each parent included in the household. Complete this section if the student's spouse, and/or parents will not file and are not required to file a 2019 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed, and neither had income earned from work in 2019.
- The student's spouse had no income earned from work in 2019.

***This section continues on the next page**

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One or both parents were employed in 2019 and have listed below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2019 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

The student's spouse was employed in 2019 and has listed below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2019 IRS W-2 forms issued to the by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Box A: Only complete this box if you worked but did not file taxes.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2019
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Parent (s):

****If you are a non- tax filer you must provide documentation from the IRS or other relevant tax authority (See below).**

IRS NON-TAX FILER STATEMENT:

***See the instruction on page 5 on how to obtain a non-tax filer letter from the IRS.**

The following applied to Independent students, parent(s), and student's spouse.

If you are a non- tax filer you must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2020 that indicates a 2019 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

Check here if confirmation of non-filing letter has been provided or

Check here if a signed statement has been provided.

SECTION 6: SIGNATURE AND ACKNOWLEDMENT

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. Per Department of Education guidelines, I understand that purposely giving false or misleading information on the FAFSA or this worksheet may result in loss of aid and additional penalties including fines, imprisonment, or both.

Student's Signature

Date

Parent's Signature (Dependent Students Only) Date

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Common Questions

Why am I completing this “Verification” process?

Your 2021-2022 Free Application for Federal Student Aid (FAFSA) was selected for a process called “Verification” by the Department of Education. The law says that before awarding Federal Student Aid, the University of La Verne must compare your FAFSA with the information on the worksheet and other required documents. We cannot process your financial aid until you submit all the required verification documents. Failure to complete the verification process in a timely manner may result in the loss of aid.

How do I obtain my Tax Return Transcript?

A **2019 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

How do I obtain my non-filing letter?

- You may follow any of the options on obtaining TRT above, but instead click on/or request the 2019 “non-tax filer letter”.

How do I submit my completed documents?

- You can submit your documents through your My Laverne Portal, via the document upload. Go to Log in to the La Verne Portal; laverne.edu→ MyLaVerne→ Login here
- Click on “Financial Aid Documents” (tab at top of page)
- Click on “Upload!” to upload documents (right hand side)
- Click on “Browse...” and locate the document you want to upload. Each document file must be uploaded separately and can be no larger than 29,771k. If a document cannot be uploaded you will receive an error message

Other options:

- You may also fax your documents to 909-448-1629.
- You may also email your documents to finaid@laverne.edu. For your security be sure to encrypt your email, otherwise our system will be unable to retrieve your unsecured documents.

What is next?

Your documents will be reviewed for completeness. Any incomplete documents will be returned and we will require any missing information, please be sure to read through and complete all sections of the worksheet.

Your verification may take up to 21 days to process and complete. If you have any questions feel free to email our department at finaid@laverne.edu or by calling 800-649-0160.

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Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2019 must provide a signed copy of the 2019 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return;
- A **2019 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2019 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2019 income tax return and applicable schedules the individual filed with the IRS; **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.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2019 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2019, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019;
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2020 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2019 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2019.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2019 tax account information.