

# 2021-2022 VERIFICATION WORKSHEET FAQ'S

## What is Verification and why was I selected?

You are not alone! Many of the students enrolled at Wingate are selected for verification and are required to submit additional documents in order to ensure the accuracy of FAFSA data.

## What do I have to submit?

You should have received an email from the Financial Planning Office with a list of documents that should be submitted along with this verification worksheet. You can also view a list of outstanding documents in your Net Partner account.

## What happens if I do not complete verification?

If a student who is selected for verification does not complete the verification process, then any Federal and/or State funding will not be awarded. (This includes, but is not limited to: Federal Direct student loan funding, Federal grant funds, and NC State grant funds.)

Students who do not wish to complete the verification process must submit a signed statement to the Financial Planning Office so any verification related documents can be waived.

## What if I did not and will not file a Federal Income Tax Return for 2019?

**Dependent Students** – Any parent whose income falls below the minimum filing threshold for a given tax year will be required to submit a Verification of Non-Filing Letter from the IRS.

**Independent Students** – Any student or spouse (if applicable) whose income falls below the minimum filing threshold for a given tax year will be required to submit a Verification of Non-Filing Letter from the IRS.

## What is the IRS Data Retrieval Tool (IRS DRT) and how do I use it?

IRS Data Retrieval allows you to electronically transfer federal tax return information directly into your online FAFSA form.

- Log in to your current FAFSA;
- In the finances section you will see a “Link to IRS” button if you are eligible to use the IRS DRT.
- Click the “Link to IRS” button to be transferred to the IRS to retrieve your info.
- On the IRS site, enter your information exactly as it appears on your federal tax return and click “submit”.
- Check the “Transfer My Tax Information into the FAFSA form” box, and click the “Transfer Now” button.
- You will know that your federal tax return information has been successfully transferred because the words “Transferred from the IRS” will display in place of the IRS information in your FAFSA form.
- For your protection, your tax information will not be displayed on either the IRS site or the FAFSA site.

## Are there certain individuals who should not use the DRT?

- Any tax filer whose marital status has changed from the time s/he has filed the FAFSA to present.
- Biological/adoptive parents of a dependent student who are unmarried, but live together.
- Any filer who has completed an amended tax return.
- Filers who have completed a Puerto Rican or foreign tax return.
- Married tax filers who...
  - file Married-Separately
  - file Head of Household

**Please be sure your First Name, Last Name, and Wingate University Student ID is written on each document!**

# VERIFICATION FAQ'S CONTINUED

## What should I submit if I have been asked to provide a copy of my Tax Return Transcript or Federal Tax Return?

You should provide a copy of either the 2019 IRS Tax Return Transcript or your **signed** 2019 Federal Tax Return. If you elect to submit your Federal Tax Return, you will need to submit all applicable schedules. Applicable schedules include Schedule 1, Schedule 2 and/or Schedule 3. Please be sure to submit all schedules that contain data to our office for review.

You can request a 2019 IRS Tax Return Transcript directly from the IRS using the following methods:

- To view and print your transcripts online, go to IRS.gov and use the Get Transcript tool.
- To order by phone, call 800-908-9946 and follow the prompts.
- To request an individual tax return transcript by mail or fax, complete Form 4506T-EZ.

**Do not list Wingate as a third-party recipient** when requesting your tax return transcript. You should have the IRS send the document directly to you and then submit a copy to our office.

Submit  
Either of  
These!



**Internal Revenue Service**  
United States Department of the Treasury

**Tax Return Transcript**

Request Date: 11-01-2012  
Response Date: 11-01-2012  
Tracking Number: 1234567890

SSN Provided: 000-00-0000  
Tax Period Ending: Dec. 31, 2011

The following items reflect the amount as shown on the return (R), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: 000-00-0000  
SPOUSE SSN: 000-00-0000  
NAME: JOHN Q TALPATER  
ADDRESS: JOHNSON, ST 00000-0000-000  
FILING STATUS: Single  
FORM NUMBER: 1040  
CYCLE POSTED: 20111231  
RECEIVED DATE: Apr. 13, 2011

**1040 U.S. Individual Income Tax Return**

Sign Here  
Preparer Use Only

Not That!



**Internal Revenue Service**  
United States Department of the Treasury

**Account Transcript**

Request Date: 10-26-2012  
Response Date: 10-24-2012  
Tracking Number: 000000000000

FORM NUMBER: 1040  
TAX PERIOD: Dec. 31, 2011

TAXPAYER IDENTIFICATION NUMBER: 000-00-0000  
SPOUSE TAXPAYER IDENTIFICATION NUMBER: 000-00-0000

JOHN Q & JANE Q TALPATER  
000 HOPE STREET  
ANY CITY, ST 00000-0000-000

## What should I submit for my Schedule 1, Schedule 2, or Schedule 3?

Submit All  
Applicable  
Schedules!



**SCHEDULE 1 Form 1040**  
Additional Income and Adjustments to Income

Additional Income

1-10	Retained	1-20
11	Taxable interest, credits, or offsets of state and local income taxes	11
12	Alimony received	12
13	Business income or loss. Attach Schedule C or C-EZ	13
14	Capital gain or loss. Attach Schedule D if required. If not required, check box	14
15	Other gains or losses. Attach Form 4797	15
16	Retained	16
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17
18	Farm income or loss. Attach Schedule F	18
19	Unemployment compensation	19
20	Retained	20
21	Other income. List type and amount	21
22	Combine the amounts in the far right column. If you don't have any adjustments to income, enter zero and include on Form 1040, line 6. Otherwise, go to line 23.	22

Adjustments to Income

23	Educator expenses	23
24	Certain business expenses of reservists, performing artists, and fee-based government officials. Attach Form 2796	24
25	Health savings account deduction. Attach Form 8889	25
26	Moving expenses for members of the Armed Forces. Attach Form 3903	26
27	Deductible part of self-employment tax. Attach Schedule SE	27
28	Self-employed SEP, SIMPLE, and qualified plans	28
29	Self-employed health insurance deduction	29
30	Punitive or early withdrawals of savings	30
31	Alimony paid to recipient's SSN	31
32	IRA deduction	32
33	Student loan interest deduction	33
34	Retained	34
35	Retained	35
36	Add lines 23 through 35	36

**SCHEDULE 2 Form 1040**  
Additional Taxes

1	Alternative minimum tax. Attach Form 6251	1
2	Charitable deduction limitation for each recipient. Attach Form 8870	2
3	Other taxes and include on Form 1040 or 1040-SR, line 15b	3
4	Unreported social security and Medicare tax from Form 990	4
5	Additional tax on first, second, subsequent plans, and other tax-related matters. Attach Form 5320-F (Required)	5
6	Recaptured investment tax credit. Attach Schedule H	6
7	Recapture of the Indian heritage credit from Form 8880. Attach Form 8881, if required	7
8	Overseer tax. Attach Form 8882	8
9	Other taxes not fully reflected from Form 965	9
10	Add lines 1 through 9. Enter here and on Form 1040 or 1040-SR, line 15c	10

**SCHEDULE 3 Form 1040**  
Nonrefundable Credits

48	Foreign tax credit. Attach Form 1116 (Required)	48
49	Credit for child and dependent care expenses. Attach Form 2441	49
50	Education credits from Form 8863, line 10	50
51	Employer savings contributions credit. Attach Form 8880	51
52	Retained	52
53	Residential energy credit. Attach Form 8865	53
54	Other credits from Form a (J 3800) (b) (1) 8801 (c) (1)	54
55	Add the amounts in the far right column. Enter here and on Form 1040, line 15d	55

# 2021-2022 VERIFICATION WORKSHEET

Your 2021-2022 Free Application for Federal Student Aid (FAFSA) was selected by the Department of Education for review. This process compares data from your FAFSA with this form and any other requested information for both and your spouse/parent(s). **We will not be able to finalize your financial aid package until all requested verification documents have been received. Be sure to check your Net Partner account for a list of documents that must be submitted to our office.**



## A. STUDENT INFORMATION

P

Last Name	First Name	Middle Initial	Student ID Number
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## B. FAMILY INFORMATION

*Please select your status below:*

Dependent Students (D)	Independent Students (I)
<input type="checkbox"/> List the people in your parents' household; include: <ul style="list-style-type: none"> <li>a) yourself and your parent(s) (including stepparent) even if you don't live with your parents</li> <li>b) your parents' other children, even if they don't live with your parent(s), if (1) your parents provide more than half of their support from July 1, 2021 to June 30, 2022, or (2) they would have to provide parental information when applying for aid</li> <li>c) other people if they now live with your parent(s), if your parent(s) provide more than half of their support and will continue to do so from July 1, 2021 through June 30, 2022</li> </ul>	<input type="checkbox"/> List the people in your household; include: <ul style="list-style-type: none"> <li>a) yourself and your spouse</li> <li>b) your children, if you will provide more than half of their support from July 1, 2021 through June 30, 2022</li> <li>c) any other people if they now live with you, and you provide more than half of their support and will continue to do so from July 1, 2021 through June 30, 2022</li> </ul>

**Write the names of all household members, including yourself:**

Full Name	Date of Birth	Relationship	College/University* (See Details Below)	Enrolled at least ½ Time
		<b>Self</b>	<b>Wingate University</b>	<b>Yes</b>

**College/University Explained:** Include the name of the college/university for any household member, excluding your parent(s), who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2021, and June 30, 2022.

## C. 2018 INCOME TAX INFORMATION

Please check the box below that applies to you and your:

Student ID Number: P \_\_\_\_\_

Parents, if Dependent Student selected on Page 1 **OR** Spouse (if applicable), if Independent Student selected on Page 1

**See page one for a complete definition of Dependent/Independent status.**

Student	Parent(s) / Spouse
<p><input type="checkbox"/> <b>I filed/will file a 2019 Federal Tax Return</b></p> <p>You must select one of the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I imported my tax information using the IRS DRT on the 2021-2022 FAFSA.</li> <li><input type="checkbox"/> I am submitting a copy of the 2019 IRS Tax Return Transcript.</li> <li><input type="checkbox"/> I am submitting a copy of the 2019 Federal Tax Return and all applicable schedules.</li> </ul>	<p><input type="checkbox"/> <b>I filed/will file a 2019 Federal Tax Return</b></p> <p>You must select one of the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I imported my tax information using the IRS DRT on the 2021-2022 FAFSA.</li> <li><input type="checkbox"/> I am submitting a copy of the 2019 IRS Tax Return Transcript.</li> <li><input type="checkbox"/> I am submitting a copy of the 2019 Federal Tax Return and all applicable schedules.</li> </ul>
<p><input type="checkbox"/> <b>I did not file a 2019 Federal Tax Return</b></p> <p><b>Step One:</b> You must select one of the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I am a dependent student and do not need to provide additional information.</li> <li><input type="checkbox"/> I am an independent student and am submitting a Verification of Non-Filing Letter from the IRS.</li> </ul> <p><b>Step Two:</b> You must select one of the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I did not earn wages in 2019</li> <li><input type="checkbox"/> I earned wages in 2019. My wage information is provided below:</li> </ul> <p>Employer: _____ Earned: \$ _____</p> <p>Employer: _____ Earned: \$ _____</p> <p>Employer: _____ Earned: \$ _____</p>	<p><input type="checkbox"/> <b>I did not file a 2019 Federal Tax Return</b></p> <p><b>Step One:</b> You must select one of the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I am submitting a Verification of Non-Filing Letter from the IRS.</li> <li><input type="checkbox"/> I am not able to obtain a Verification of Non-Filing Letter from the IRS. I will contact the Financial Planning Office for assistance.</li> </ul> <p><b>Step Two:</b> You must select one of the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I did not earn wages in 2019</li> <li><input type="checkbox"/> I earned wages in 2019. My wage information is provided below:</li> </ul> <p>Employer: _____ Earned: \$ _____</p> <p>Employer: _____ Earned: \$ _____</p> <p>Employer: _____ Earned: \$ _____</p>

## D. CERTIFICATIONS AND SIGNATURES

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date below. By signing this form, I (we) also authorize Wingate University to make any changes to the originally reported FAFSA data that result from the Verification process. **Warning:** *If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.*

<b>X</b>	<b>X</b>
Student's Signature	Parent's Signature (Dependent Students Only)
Date	Date

----- You should make a copy of this worksheet for your records. -----