

2020-2021 INDEPENDENT Verification Form

South Dakota Public Higher Education

Black Hills State University ♦ Dakota State University ♦ Northern State University
 South Dakota School of Mines & Technology ♦ South Dakota State University ♦ The University of South Dakota

Send all paperwork to:

Enrollment Service Center (ESC) 414 East Clark St SL30 Vermillion, SD 57069-2390	FAX: (605) 677-6828 Phone: (605) 658-6160 or (800) 404-1547 E-mail: ESCFinAid@usd.edu
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Please use blue or black ink to complete this document.

1. Student Information:

Last Name	First Name	M.I.	Student ID # or Last 4 digits of SSN
Address (include Apt No.)			() _____ Phone Number
City	State	Zip	E-mail

2. Please identify the people in your household, include:

- yourself,
- your spouse,
- your children if you will provide more than half of their support between July 1, 2020 and June 30, 2021, even if they do not live with you,
- other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2020 and June 30, 2021.

Name	Age	Relationship
		STUDENT/SELF

3. Please identify the people listed in the above household who will be attending college at least half-time between July 1, 2020 and June 30, 2021 and be in a degree or certificate program.

Name	Name of College/Postsecondary School
STUDENT/SELF	

4. Refer to the enclosed sheet for detailed instructions regarding tax information requested, then complete and sign the back of this form.

5. Student: Did you file a 2018 U.S. Federal Tax Return?

If YES:

Choose One

- I successfully used the Link to IRS on _____ (date).
- Attached is my 2018 IRS Tax Return Transcript.
- I have ordered a 2018 IRS Tax Return Transcript and will submit it when it is received.
- Attached is my **SIGNED** 2018 Federal Tax Return (including Schedules 1-3).

If NO:

Choose One

- I did not earn income during 2018 and I am not required to file a 2018 Federal Tax Return. **Attached** is my IRS Verification of Non-filing Letter.
- I am not required to file a 2018 Federal Tax Return but did earn income during 2018. **Attached** are my 2018 W-2s (or my 2018 IRS Wage and Income Transcript) AND my IRS Verification of Non-filing Letter.

NON-FILERS ONLY List the Names of ALL the Student's Employers	Enter the Amount Earned from each Employer in 2018	W-2 OR IRS Wage & Income Transcript Attached? (circle one)
		W-2 or IRS Wage & Income Transcript
		W-2 or IRS Wage & Income Transcript
		W-2 or IRS Wage & Income Transcript

**6. Must complete if student is married and did not file 2018 taxes as married, filed jointly:
Spouse: Did you file a 2018 U.S. Federal Tax Return?**

If YES:

Choose One

- I successfully used the Link to IRS on _____ (date).
- Attached is my 2018 IRS Tax Return Transcript.
- I have ordered a 2018 IRS Tax Return Transcript and will submit it when it is received.
- Attached is my **SIGNED** 2018 Federal Tax Return (including Schedules 1-3).

If NO:

Choose One

- I did not earn income during 2018 and I am not required to file a 2018 Federal Tax Return. **Attached** is my IRS Verification of Non-filing Letter.
- I am not required to file a 2018 Federal Tax Return but did earn income during 2018. **Attached** are my 2018 W-2s (or my 2018 IRS Wage and Income Transcript) AND my IRS Verification of Non-filing Letter.

NON-FILERS ONLY List the Names of ALL the Spouse's Employers	Enter the Amount Earned from each Employer in 2018	W-2 OR IRS Wage & Income Transcript Attached? (circle one)
		W-2 or IRS Wage & Income Transcript
		W-2 or IRS Wage & Income Transcript
		W-2 or IRS Wage & Income Transcript

7. Certification of signatures: SENDING WITHOUT A SIGNATURE WILL DELAY THE FINANCIAL AID PROCESS. Typed signatures NOT accepted.

By signing this worksheet, we certify that all information reported on this form to qualify for Federal aid is complete and correct.

Student Signature

Date

Spouse Signature (if applicable)

Date

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

Instructions for Providing Tax Documentation

Link to IRS using the IRS Data Retrieval Tool on the FAFSA:

1. Go to www.FAFSA.gov
2. Log in to your 2020-21 FAFSA
3. Select "Make FAFSA Corrections"
4. Navigate to the student Financial Information section
5. Answer a few questions and then click "Link to IRS" to transfer 2018 IRS income tax information into your FAFSA
6. Successfully transferring your tax information using the IRS Data Retrieval Tool returns you to your FAFSA
7. You must re-sign the FAFSA and submit the updated information.

Please Note: If you are providing a copy of a 2018 Federal Tax Return it must be **signed**. If you filed an amended return in 2018, you will also need to submit a **signed** copy of your IRS Form 1040X.

If you are unable to use the Link to IRS

Some students and parents may be unable to use the IRS Data Retrieval Tool. Examples of these situations include, but are not limited to:

- Marital status changed after December 31, 2018, or
- Tax filing status of "married filing separately" and marital status of "married/re-married" when completing the FAFSA, or
- You filed a foreign tax return.

If you are unable to use the IRS Data Retrieval Tool, you can contact the IRS directly for the below items (if needed):

- 2018 IRS Tax Return Transcript
 - If you filed an amended return in 2018, you will also need to submit a **signed** copy of your IRS Form 1040X.
- 2018 Wage and Income Transcript
- 2018 IRS Verification of Non-filing Letter (dated 10/1/19 or after)

Choose **one** of the following options:

- Go to <http://www.irs.gov/transcript>
 - Click "Get Transcript ONLINE" to register, then print or download your transcript immediately.
 - Click "Get Transcript by MAIL" to receive your transcript in 5 to 10 calendar days.
- Call 1-800-908-9946 to order a transcript to be mailed to you.
- Submit a Form 4506-T, Request for Transcript of Tax Return, to the IRS via fax or mail to order a transcript to be mailed to you.
- You may be able to go directly to your local IRS office for an in-person request. You will have to call to make an appointment to obtain a transcript in person. To find a listing of IRS offices in your area, go to: <http://www.irs.gov/uac/Contact-Your-Local-IRS-Office-1>.

Send all documents to:

Enrollment Service Center
414 E Clark St SL30
Vermillion SD 57069
Fax #: 605-677-6828
Email: ESCFinAid@usd.edu