

Carson-Newman University

2021-2022 Independent V5 Verification Worksheet

| | | | |
|--------------------------|----------------------|----------------|--------------------------------------|
| Student's Last Name | Student's First Name | Student's M.I. | Student's Identification (ID) Number |
| Student's E-Mail Address | | | Student's Home/Cell Phone Number |

Your 2021-2022 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. This process is mandated by the US Department Education, requiring schools to verify the data provided on the FAFSA to ensure its accuracy. We must ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this worksheet and with any other required document(s). If there are differences, your FAFSA information may need to be corrected.

You must complete and sign this worksheet and submit it to the Financial Aid Office at your earliest convenience. Please note that additional documentation may be requested for clarification.

PLEASE COMPLETE IN BLUE OR BLACK INK. FORMS COMPLETED IN PENCIL WILL NOT BE ACCEPTED.

A. Household Information

List below the people in your household whose information was included on the FAFSA. Include:

- Yourself (the student)
- Your spouse, if you are married.
- Your children, if you will provide more than half of their support from July 1, 2021, through June 30, 2022, or if the child would be required to provide your information if they were completing a 2021-2022 FAFSA. 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, 2022.

Include the name of the college/university for any household member, 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. *If more space is needed, attach a separate page with the student's name and ID number at the top.*

| Household Members | Age | Name | Name of College/University Attending | Enrolled at Least Half Time (Y/N) |
|-------------------|-----|------|--------------------------------------|-----------------------------------|
| <i>Student</i> | | | <i>Carson-Newman University</i> | |
| <i>Spouse</i> | | | | |
| <i>Child</i> | | | | |
| <i>Other</i> | | | | |
| <i>Other</i> | | | | |

Student's Last Name

Student's Identification (ID) Number

B. Income Tax Information

Check ONE box that applies to you (the Student) and ONE box that applies to your spouse (if applicable).

| STUDENT | SPOUSE |
|---|---|
| <input type="checkbox"/> I filed a 2019 Federal Tax Return. Did you use the IRS Data Retrieval Tool* to transfer your 2019 tax data directly from the IRS to the FAFSA <input type="checkbox"/> Yes <input type="checkbox"/> No – Update your FASFA and use the IRS Data Retrieval Tool OR submit a copy of your 2019 Tax Return Transcript ** If student and spouse filed separate 2019 IRS income tax returns, then 2019 Tax Return Transcripts must be provided for each. <i>(see information below)</i> | <input type="checkbox"/> I filed a 2019 Federal Tax Return. Did you use the IRS Data Retrieval Tool* to transfer your 2019 tax data directly from the IRS to the FAFSA <input type="checkbox"/> Yes <input type="checkbox"/> No – Update your FASFA and use the IRS Data Retrieval Tool OR submit a copy of your 2019 Tax Return Transcript ** If student and spouse filed separate 2019 IRS income tax returns, then 2019 Tax Return Transcripts must be provided for each. <i>(see information below)</i> |
| <input type="checkbox"/> I did NOT file a 2019 Federal Tax Return, but did earn income in 2019; however, I was not required to file taxes. (Complete Section C) **An IRS Letter of Non-Filing is required for the student if they did NOT file 2019 taxes** <i>(see information below)</i> | <input type="checkbox"/> I did NOT file a 2019 Federal Tax Return, but did earn income in 2019; however, I was not required to file taxes. (Complete Section C) **An IRS Letter of Non-Filing is required for the spouse if they did NOT file 2019 taxes** <i>(see information below)</i> |
| <input type="checkbox"/> I was NOT employed and had NO INCOME earned from work in 2019. **An IRS Letter of Non-Filing is required for a student if they did NOT file 2019 taxes** <i>(see information below)</i> | <input type="checkbox"/> I was NOT employed and had NO INCOME earned from work in 2019. **An IRS Letter of Non-Filing is required for a spouse if they did NOT file 2019 taxes** <i>(see information below)</i> |

***IRS Data Retrieval Tool**

- Make a correction to you FAFSA online and access the tool within the Financial Information section.
- Don't forget to sign and submit the FAFSA correction.

This allows on-line FAFSA filers to pull their tax data direction from the IRS to auto-fill the tax portion of the FAFSA and is the quickest way to get accurate tax information to the Financial Aid Office.

****How to Obtain an IRS Tax Return Transcript or a Letter of Non-Filing**

- Make an on-line request at <https://www.irs.gov/individuals/get-transcript>
 The requester must have access to a valid email address, a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the requester's name, and specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript will display on-line 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: IRS Form 4506T
 This form needs to be used if you have moved since filing your taxes. The form can be downloaded at www.irs.gov, click "Get Transcript by MAIL". The transcript is generally received within 10 business

 Student's Last Name

 Student's Identification (ID) Number

C. Submit Copies of W-2's (For Non-Tax Filers)

All non-tax filers (Students and Spouses, if applicable) must provide copies of all your W-2 forms for income earned from work that were NOT filed with a 2019 Federal Income Tax Return. If you have lost any W-2's, you may order a Wage and Income Transcript from the IRS. You can request this transcript from www.irs.gov. If no employer W-2 can be provided, please list below the employer name, amount earned for 2019, and the reason it cannot be provided.

| Employee's Name (Student or Spouse) | 2019 Amount Earned | Employer's Name | Reason for Not Providing |
|--|-----------------------|-----------------|-----------------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

D. High School Completion Status

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2021-2022:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate or GED transcript.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.

If the student is unable to obtain the documentation listed above, please contact the Financial Aid Office.

Student's Last Name

Student's Identification (ID) Number

E. Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at **Carson-Newman University** to verify his or her identity by presenting valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, in the presence of the institutional official, the following:

Statement of Educational Purpose

I certify that I, _____ am the individual signing this
(Print Student's Name)
Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Carson- Newman University** for the 2021-2022 school year.

(Student's Signature)

(Date)

(Student's ID Number)

F. Signatures

Each person signing below certifies that all the Information reported is complete and correct.

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

Student's Signature

Date

Please make a copy of this worksheet for your records.
Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the Financial Aid Office at Carson Newman University, 1646 Russell Avenue, Jefferson City, TN 37760 or by fax at 865-471-2035.
If you should have any questions, please contact the Financial Aid Office at 1-800-678-9061 or 865-471-3247.

Student's Last Name

Student's Identification (ID) Number

Identity and Statement of Educational Purpose

If you (the student) are unable to appear in person at **Carson-Newman University** to verify your identity, you must provide:

- (a) A notarized copy of a valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or a passport; and
- (b) the original notarized Statement provided below.

Statement of Educational Purpose

I certify that I, _____, am the individual signing this
(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Carson- Newman University** for the 2021-2022 school year.

(Student's Signature)

(Date)

(Student's ID Number)

Notary's Certificate of Acknowledgement

State of _____
City/County of _____

On _____, before me, _____,
(Date) (Notary's name)

personally appeared, _____, and provided to me
(Printed name of signer)

on the basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

Notary signature

My commission expires on _____

(Seal)