



## 2020-2021 INDEPENDENT VERIFICATION WORKSHEET

Your 2020–2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, the Financial Aid Office may ask you to confirm the information you, and your spouse (if married) reported on your FAFSA. To verify that you provided correct information, the Financial Aid Office will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit this form and the required documents to the Financial Aid Office.

### A. Student's Information

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 Last Name

First Name

Middle

 Massasoit Student ID#
 

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 Street Address

City

State

Zip Code

Preferred Phone Number

### B. Number of Household Members and Number in College

List the members of your household below. Be sure to include:

- Yourself (list yourself on the first line of the grid below).
- Your spouse, if you are married.
- Your children (if any) and your spouse's children, if you and/or your spouse will provide more than half of their support from July 1, 2020 through June 30, 2021, even if the children do not live with you.
- Other people if they now live with you, and you and/or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.

Full Name	Age	Relationship to student	Name of the COLLEGE the person will be attending at least half-time between 7/1/20-6/30/21 (if applicable):
		<i>Self</i>	<i>Massasoit Community College</i>

**C. STUDENT/SPOUSE TAX AND INCOME INFORMATION (complete only one of the questions below):**

**SECTION 1:** ONLY complete this section if you and/or your spouse (if applicable) filed, or will file, a 2018 Income Tax Return (Form 1040).

Check the one box that applies:

- I have used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2018 IRS income information into my FAFSA.
  
- I am unable or choose not to use the IRS Data Retrieval Tool in the FAFSA, therefore I will submit to the Financial Aid Office:
  - A signed copy of my, and my spouse’s (if married) 2018 federal tax return, including all pages, schedules and W-2 forms, **OR**
  - A copy of my, and my spouse’s (if married) 2018 Tax Return Transcript from the IRS, and all W-2 forms. Please see page 4 for instructions on how to obtain a Tax Return Transcript.

**SECTION 2:** ONLY complete this section if you and/or your spouse (if applicable) did not file, and were not required to file, a 2018 Income Tax Return.

To complete federal verification, all applicants that did not file a 2018 tax return are required to provide documentation from the IRS, or relevant tax authority, dated on or after October 1, 2019, that clearly indicates a 2018 income tax return was not filed. **See page 5 for instructions on how to obtain a “Verification of Non-filing letter” from the IRS.**

Check the box(es) that apply:

- I was not employed and had no income from work in 2018. **You must provide IRS documentation of your non-filer status. See page 5 for instructions on how to obtain a “Verification of Non-filing letter” from the IRS.**
  
- My spouse (if married) was not employed and had no income from work in 2018. **You must provide IRS documentation of your spouse’s non-filer status. See page 5 for instructions on how to obtain a “Verification of Non-filing letter” from the IRS.**
  
- I and/or my spouse was employed in 2018 and I have listed below the names of all of our employers and the amount that was earned from each employer in 2018. *If you checked this box, you must submit copies of all 2018 IRS W-2 forms. List all employers even if they did not issue a W-2 form. In addition, you (and your spouse, if married) must provide IRS documentation of your non-filer status. See page 5 for instructions on how to obtain a “Verification of Non-filing letter” from the IRS.*

Employer’s Name	Whose earnings? You or your spouse?	2018 Amount Earned (In U.S. dollars)

**D. Certification and Signatures**

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

I certify that all of the information reported on this form is complete and correct.

\_\_\_\_\_  
**Student's Signature**

\_\_\_\_\_  
**Date**

Please submit your signed and completed form, along with all requested documentation, via one of the following methods:

- Submit electronically at: <https://massasoit.edu/enrollment/paying-for-college/financial-aid/financial-aid-form-submission/>
- Mail to: Massasoit Community College, Financial Aid Office, One Massasoit Blvd, Brockton, MA 02302
- Fax to: (508) 427-1232

To ensure the protection of your personal information, please do not submit any documents with Personally Identifiable Information (PII), including your social security number, via email.

**Frequently Asked Questions and Disclosures**

**Why was I selected for verification?**

There are various reasons why a FAFSA applicant may be selected for verification by the Department of Education, or Massasoit staff. Perhaps the FAFSA included estimates of federal income tax information and the actual information now needs to be confirmed. Or maybe the FAFSA was submitted with data that appears inconsistent or unusual, or includes the type of information that is frequently misreported. Finally, you may have been selected for verification through a random process used to get a sampling of how accurately families fill out the FAFSA. Each year approximately 30-40% of our applications are selected for verification.

**What is the deadline to submit verification paperwork for the 2020-21 year?**

For Pell Grant applicants, the deadline for 2020-2021 has not been published, but the deadline is expected to be approximately September 18, 2021, or 120 days after the last day of the student's enrollment, whichever is earlier. Loan recipients must complete the verification and loan acceptance processes prior to ceasing enrollment as at least a half-time student.

**What happens if I do not provide the verification information requested?**

If you do not provide the verification documentation, you are not eligible for most federal, state, and institutional financial aid. Therefore, please submit the requested verification information promptly to avoid a delay in your financial aid application processing.

## How to Obtain a Tax Transcript from the IRS

A **2018 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax 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.

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2018 must provide:

- A 2018 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), **OR** a signed copy of the original 2018 Federal Tax Return, **OR** any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **AND**
- A signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

### Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands 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.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, should submit a signed copy of the 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. Information should be translated into English and converted to US dollars.

### 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 2018 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.

## How to Obtain a Verification of Non-filing letter from the IRS

An IRS Verification of Non-filing Letter will provide proof from the IRS that there is no record of a filed tax form (1040) for the year you have requested. For the 2020-2021 academic year, you will be requesting a verification letter for 2018. Non-Tax filers can request an IRS Verification of non-filing, free of charge from the IRS in one of the following ways:

### Online Request @ [www.irs.gov](http://www.irs.gov):

- Click on “Get your Tax Record,” then click “Get Transcript Online.”
- Enter Social Security Number, email address, filing status, and account numbers for loan or credit card associated with your name, and mobile phone associated with your name.
  - *If you are unable to and/or do not have accounts in your name that meet the identity validation requirements, you will need to request the form by PAPER-you CANNOT request the transcript to be mailed via the IRS website.*
- Click “Continue”
- Select “**Verification of Non-filing Letter**” and in the Tax Year field, select “**2018**”.
- If successfully validated, you will be able to view and print your IRS Verification of Non-filing Letter.

**By Paper** using IRS form 4506-T. This is the **ONLY** option for individuals who have never filed a tax return with the IRS. How to complete the IRS Form 4506-T:

- Complete lines 1 – 4, following the instructions on page 2 of the form.
- Line 3: enter the non-filer's street address and zip or postal code.
- Line 7: Select the checkbox on the right hand side for **Verification of Non-filing**.
- Line 9: Year or period requested field, enter **12/31/2018**.
- The non-filer must sign and date the form and enter their telephone number. Only one signature is required when requesting a joint IRS Verification of Non-filing Letter.
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of Form 4506-T.
- If the form 4506-T information is successfully validated, tax filers can expect to receive a paper IRS Verification of Non-filing Letter at the address provided on their request within 10 to 15 days.

Please note: Instead of a “Verification of Non-filing” letter, we can also accept any IRS document (such as a Form 13873 or Tax Account Transcript) that clearly indicates that the IRS does not have a tax return record on file for 2018.

### **What happens if I and/or my spouse lived, or live, outside the U.S and cannot obtain the IRS Verification of Non-filing Letter?**

Individuals from a U.S. territory or commonwealth (Puerto Rico) or a foreign central government who are not required to file an income tax return under that taxing authority’s rules must submit the following:

A signed and dated statement certifying:

- The sources and amounts of *all* of the individual(s) income in 2018, converted to U.S. dollars, **AND**
- That the individual(s) has not filed and is not required to file taxes in 2018 in his/her country, and the name of that country, **AND**
- Include with the statement, documentation from the taxing authority that the individual(s) did not file a tax return.\*\*

*\*\*If such documentation does not exist, or if the individual(s) is unable to obtain the documentation, the individual must include in his/her signed statement a certification stating that that the tax authority does not provide such documentation or that the individual was unable to obtain the documentation after contacting the tax authority.*