

2020-2021 Independent Verification Worksheet



Cumberland
UNIVERSITY

Your application was selected for review in a process called "Verification". In this process we will be comparing information from your FAFSA with copies of you and your spouse's (if applicable) 2018 Federal IRS Tax Return and/or income information. If there are differences between the information you submitted on your FAFSA and your financial documents, we may need to make corrections electronically to your application.

What you must do

1. Provide your (and your spouse's) tax and financial information utilizing the FAFSA on the Web IRS Data Retrieval Tool (DRT).
2. If you (and your spouse) are unable to utilize the DRT, you must submit an official 2018 IRS Tax Return Transcript or 2018 IRS Tax Return (and **all** Schedules and Amended returns (if any)).
 - Request it from the IRS by calling 800-908-9946.
 - You may submit your request online at www.irs.gov. Click on "Get My Tax Record" then choose whether you want to get it by mail or online. Be sure to request a return transcript for the tax year 2018, an account transcript is not acceptable documentation.
 - Availability of the transcript, from the date you file your tax return, is the same as the DRT (see above). You should receive your transcript in 10 to 14 days.
3. Complete and sign this worksheet.
4. Submit the completed worksheet, tax returns/transcripts (if applicable), and any other documents requested of you to: Cumberland University Financial Aid Office, 1 Cumberland Square, Lebanon, TN 37087. You may also fax these documents to our office at 615-443-8424 or email to financialaid@cumberland.edu. **Do not mail this form to the Dept. of Education.** Contact our office at 615-547-1399 if you have questions about completing this worksheet.

A. Student Information

Last	First	Middle	CAMS Student ID (A0000#####)
Address (include apt. no.)			Date of birth
City	State	Zip Code	Phone number (include area code)

B. Family Information

List the people in your household, including:

- Yourself and your spouse, if you have one (Marital status should be as of the day you submitted your FAFSA.)
- Your children, if you will provide more than half of their support from July 1, 2020 through June 30, 2021 (even if they don't live with you).
- Other people if they now live with you and you provide more than half of their support. (In order to include other people in your household size, you must continue to provide more than half of their support from July 1, 2020 through June 30, 2021.)

Write the names of all household members in the space(s) below. Also, write in the name of the college for any household member who will be attending at least halftime between July 1, 2020 and June 30, 2021, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		Self	Cumberland University

C. Student's Tax Return and Income Information - Check only one box below.

- The student and/or spouse (if married) utilized the FAFSA IRS Data Retrieval Tool (DRT) and did not alter any of the information that was transferred.
- The student and/or spouse (if married) will submit a correction to the FAFSA and utilize the DRT by _____ (date). I realize that I must NOT change any of the information that is transferred.
- The student and/or spouse (if married) are unable or choose not to use the DRT and will provide a 2018 IRS Tax Return Transcript/Tax Return (and all Schedules and amended returns as needed) instead. (See instruction in step 2 of "What you must do" on the other side of this form.)
- The student and/or spouse (if married) will not file, and are not required to file, a 2018 Federal Tax Return (See D1 below)
- My spouse and I filed separately and/or are unable to use the IRS Data Retrieval and I am attaching copies of both transcripts/returns and all schedules.
- Neither my spouse nor I filed a 2018 Federal Tax Return and we are not required to file one. (See D1 below) Additional documentation from the IRS will be required to confirm non-filing status, please see instructions below. Please provide copies of all W-2s or 1099s for 2018 to the Financial Aid Office.

D. Additional Sources of Income

1. Verification of additional financial information –*If you and/or your spouse, if married, did not file and are not required to file a 2018 Federal income tax return, list below your Employer and any additional income received in 2018 (use the W-2 form or other earnings statements, if available). If you did not have any income please list N/A and 0's.*

Source	2018 Income
	\$
	\$
	\$
	\$
	\$

How to Request an IRS Tax Return Transcript/Verification of Non-filing Letter

You can request your IRS Tax Return Transcript or a Verification of Non-filing letter by phone at 1-800-908-9946 or by going online. To request a transcript or letter online, go to www.irs.gov and click on “Get Your Tax Record”, then “Get Transcript Online”. Follow instructions to create an account/log in and request a Tax Return Transcript or a Verification of Non-filing Letter online or have it mailed to you.

Another option is to complete Form **4506-T** and mail or fax it to the IRS to request your transcript/letter. This form is available under the “Forms & Instructions” tab at www.irs.gov. If you live and work in Tennessee, you can either mail the 4506-T to the Internal Revenue Service/RAIVS Team/P.O. Box 9941/Mail Stop 6734/Ogden, UT 84409 or fax it to them at 855-298-1145. If you live or work in another state, please carefully review the contact information on the 2nd page of the 4506-T to determine where your form should be sent.

E. Signatures

I (we), the undersigned, certify that all the information reported to qualify for federal student aid is complete and correct.

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

Student’s Signature

Date

Spouse’s Signature (if married)

Date