



Financial Aid  
 (816) 271-4361  
 Fax (816) 271-5879  
 finaid@missouriwestern.edu

## 2018-19 Verification Worksheet

Your student aid application was selected for review by the U.S. Department of Education. Missouri Western is required by federal law to compare your application with information on this worksheet and with your 2016 federal tax documents. This includes spouse's information if married and parents' information if you are considered dependent for federal aid purposes.

Once complete, necessary corrections will be submitted to the Central Processing System and you will receive an amended Student Aid Report (SAR) including required adjustments to your Expected Family Contribution (EFC). You may review changes to your offered awards on GOLDLINK.

**Missouri Western's priority deadline for completion of the verification process is February 1, 2018.** Completing the process after this date, may result in you not being considered for Missouri Western competitive scholarships and other aid opportunities including Federal SEOG and the Access Missouri Grant. You may also be required to make payments towards your account balance until your aid eligibility can be determined.

**The final deadline to complete the verification process** is established by the Federal government and published in the Federal Register on an annual basis – [www.federalregister.gov/](http://www.federalregister.gov/).

### A. Student Information

Last Name	First Name	MI	Age	Student ID

### B. Your Parent or Spouse Information

#### Dependent Students

- List your parent(s), including step-parent (if applicable). Do not include your non-custodial parent.

#### Independent Students

- List your spouse (if applicable).

Full Name	Age	Relationship to Student	Attending College	Name of the College <small>If enrolled at least half-time during 2018-19.</small>
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

### C. Other Household Members

#### Dependent Students

- List your parent(s)' other dependent children if your parent(s) will provide more than half of their support from July 1, 2018 through June 30, 2019.
- Also include other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2018 through June 30, 2019.

#### Independent Students

- List your children, if you will provide more than half of their support from July 1, 2018 through June 30, 2019.
- Also include other people only if they now live with you and you will provide more than half of their support from July 1, 2018 through June 30, 2019.

Full Name	Age	Relationship to Student	Attending College	Name of the College <small>If enrolled at least half-time during 2018-19.</small>
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

## D. Student/Spouse Tax Filing Status

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you and/or your spouse file, or will you file, a 2016 Federal IRS Tax Return?
<i>If yes...</i>	If you and/or your spouse filed, or will file a 2016 Tax Return, a copy of your Tax Return Transcript is required. You may also use the IRS Data Retrieval Tool (DRT) within your FAFSA application to satisfy this requirement. (See instructions for additional information.)
<i>If no...</i>	If you and/or your spouse did not, and were not required to file a 2016 Tax Return, <ul style="list-style-type: none"><li>• complete the Statement of Non-Filing Status (Form 1a);</li><li>• provide copies of W-2's and/or 1099 forms from ALL employers. <i>Replacement copies of W-2's may be obtained from your employer or by requesting a Wage and Income Transcript from the IRS;</i> and</li><li>• if requested, provide documentation from the IRS dated on or after October 1, 2017 that indicates a 2016 income tax return was not filed (Form 1c).</li></ul>

## E. Parent/Step-Parent Tax Filing Status (if Applicable)

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did your parent(s), including your step-parent (if applicable) file, or will they file, a 2016 Federal IRS Tax Return?
<i>If yes...</i>	If your parent(s), including your step-parent (if applicable), filed, or will file a 2016 Tax Return, a copy of their Tax Return Transcript is required. They may also use the IRS Data Retrieval Tool (DRT) within your FAFSA application to satisfy this requirement. (See instructions for additional information.)
<i>If no...</i>	If your parent(s) including your step-parent (if applicable) did not, and were not required to file a 2016 Tax Return, they must <ul style="list-style-type: none"><li>• complete the Statement of Non-Filing Status (Form 1a);</li><li>• provide copies of W-2's and/or 1099 forms from ALL employers. <i>Replacement copies of W-2's may be obtained from your employer or by requesting a Wage and Income Transcript from the IRS;</i> and</li><li>• if requested, provide documentation from the IRS dated on or after October 1, 2017 that indicates a 2016 income tax return was not filed (Form 1c)</li></ul>

## F. Student Contact Information

\_\_\_\_\_

Address (include apartment number)

\_\_\_\_\_

Email Address

\_\_\_\_\_

City

\_\_\_\_\_

State

\_\_\_\_\_

Zip

\_\_\_\_\_

Phone Number

## G. Sign and Date This Worksheet

By signing this worksheet I/we certify that all the information reported is complete and accurate. Warning: If you purposely give false or misleading information, you may be fined, sentenced to jail, or both.

\_\_\_\_\_

Student Signature

\_\_\_\_\_

Date

\_\_\_\_\_

Parent Signature (If Applicable)

\_\_\_\_\_

Date

## H. Submit Documents

Submit this worksheet with all required documentation to:

Office of Financial Aid  
Missouri Western State University  
Eder Hall Room 103  
St. Joseph, Missouri 64507  
FAX: 816-271-5879

**Please make sure all forms  
and documents are signed  
and include your student ID**

# Instructions for Obtaining IRS Tax Return Transcript

## FAFSA IRS Data Retrieval Tool

★ Recommended ★

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

- Go to [www.fafsa.gov](http://www.fafsa.gov) and select Login.
- Select “Make FAFSA Corrections”
- Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.



**IMPORTANT: If you use the Data Retrieval Tool to link your tax information, please do not submit paper copies of Tax Return Transcripts unless requested by the Financial Aid Office.**

## Don't Want to Use the Data Retrieval Tool?

**If you are unable to use the Data Retrieval Tool, or you choose not to, you must submit:**

1. a paper copy of all required Tax Return Transcript(s) **and**
2. copies of W-2's or 1099 forms from ALL employers (student and parent). *Replacement copies of W-2's can be obtained from your employer or you may obtain a Wage and Income Transcript from the IRS ([www.IRS.gov](http://www.IRS.gov)).*

## Options for Getting Your IRS Tax Return Transcript

### Online Request

- Go to [www.IRS.gov](http://www.IRS.gov)
- Under the **Tools heading** on the IRS homepage, select "Get Transcript of Your Tax Records."
- Select "Get Transcript ONLINE" or "Get Transcript by MAIL."
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

**Telephone Request** - 1-800-908-9946

**Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

## Tax Filers with Special Circumstances

**Individuals Granted a Filing Extension by the IRS** - Provide the following:

- a copy of IRS Form 4868 that was filed with the IRS for the tax year;
- a copy of the IRS's approval of an extension beyond the automatic six-month extension (if applicable);
- a copy of W-2 forms for **each** source of employment income received for the tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the tax year; **and**
- documentation from the IRS dated on or after October 1, 2017 that indicates a 2016 income tax return was not filed (Form 1c).

**Individuals Who Filed an Amended IRS Income Tax Return** - Provide a copy of the IRS tax return transcript **and** a signed copy of the IRS Form 1040X.

**Individuals Who Were Victims of Tax Administration Identity Theft** - Call the IRS at 1-800-908-4490 and complete Financial Aid Form 1e.

**Individuals Who Filed Non-US Income Tax Returns** - Provide a signed copy of that income tax return(s); **or** a transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for the tax year.