

Piedmont University 2022-2023 Standard Verification Worksheet

Your 2022 - 2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. In this process, the Financial Aid Office will compare information from your FAFSA with information on this worksheet and with any other required documents. If there are differences, we will correct your FAFSA electronically. We are required by law to verify your FAFSA is accurate. We may request additional information. To ensure timely awarding of your financial aid, return this form and all required documents within **14** days. If you have questions about verification, contact the Financial Aid Office as soon as possible so that your financial aid will not be delayed: 706-776-0114 or finaid@piedmont.edu.

Submit Documents by: FAX: 706-778-0708 Mail: Piedmont University, Financial Aid Office, P.O. Box 10, Demorest GA 30535

A. Student's Information:

Last Name: _____ First Name: _____ MI: _____

Student ID: _____ E-Mail: _____ Phone: _____

B. Student Family Information (Household Size and Number in College):

<p><u>DEPENDENT STUDENTS</u> should list:</p> <ul style="list-style-type: none"> Yourselves and parents (biological or adoptive), if they are living together, regardless of marital status or gender. This may include a step-parent if your parent is remarried—even if you do not live with your parents. Any other people for whom your parents will supply more than half of their support from July 1, 2022 - June 30, 2023. (This would include siblings.) 	<p><u>INDEPENDENT STUDENTS</u> should list:</p> <ul style="list-style-type: none"> Yourselves and your spouse (if married, and not separated). Any other people for whom you will supply more than half of their support from July 1, 2022 - June 30, 2023. (This would include your children that you provide more than half of their support.)
--	---

Full Name	Age	Relationship	College attending 2022-2023 <i>(degree seeking, attending at least half-time)</i>
		<i>Self / Student</i>	Piedmont University

If more space is needed, provide a separate page with the student's name and ID number at the top.

2020 Tax Return and Income Information:

(Student: Check appropriate box in section C. If a Dependent Student: Parent also checks appropriate box in section D.)

C. Student (and spouse, if applicable): (Check a box below.)

Student has transferred 2020 taxes using the IRS Data Retrieval Tool on <https://www.studentaid.gov>.

Student was not able to use the IRS Data Retrieval Tool on the FAFSA and is attaching a signed copy of the 2020 tax return and all applicable schedules (and amended 1040X if applicable).

Student did not work in 2020 and did not file, will not, and is not required to file a 2020 U.S. tax return.

Student worked in 2020 but did not file, will not, and is not required to file a 2020 U.S. tax return. Attached are 2020 W-2 forms for each employer.

Employer: _____

D. Parent (For Dependent Students only): (Check a box below.)

Parent(s) has transferred 2020 taxes using the IRS Data Retrieval Tool on <https://www.studentaid.gov>.

Parent(s) was not able to use the IRS Data Retrieval Tool on the FAFSA and is attaching a signed copy of the 2020 tax return and all applicable schedules (and amended 1040X if applicable).

Parent(s) did not work in 2020 and did not file, will not, and is not required to file a 2020 U.S. tax return.

Parent(s) worked in 2020 but did not file, will not, and is not required to file a 2020 U.S. tax return. Attached are 2020 W-2 forms for each employer.

Employer: _____

E. Certifications and Signatures: By signing this worksheet, I (we) certify that all of the information to qualify for federal financial aid is complete and correct. I (we) understand that giving false or misleading information can result in a fine, jail sentence, or both.

Student's Signature _____ Date _____

Parent Signature (Dependent Student) _____ Date _____

Instructions for Obtaining Tax Documents

FAFSA IRS Data Retrieval Tool

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.studentaid.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 successfully used the Data Retrieval Tool, you do not need to submit a copy of your tax return.

Unable to Use the Data Retrieval Tool?

If you are unable or choose not to use the Data Retrieval Tool (DRT), a signed paper copy of all required 2020 Tax Return(s) and applicable schedules will be needed to complete verification of your FAFSA.

Dependent Student: If your parents or parent and step-parent provided on your FAFSA filed separate 2020 IRS income tax return, the IRS DRT cannot be used and a signed 2020 Tax Return and applicable schedules must be provided for each.

Independent Student: If you and your spouse filed a separate 2020 IRS income tax return, the IRS DRT cannot be used and a signed 2020 Tax Return and applicable schedules must be provided for each.

If copies of 2020 tax returns are not available, a **2020 Tax Return Transcript** can be ordered at: www.irs.gov

- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click “Get Transcript by Mail.” Make sure to request the “**Return Transcript**” and **NOT** the “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, click "Get Your Tax Record." Click “Get Transcript Online.” Make sure to request the “**Return Transcript**” and **NOT** the “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.

Tax Filers with Special Circumstances

Individuals Who Filed an Amended IRS Income Tax Return - Provide a signed copy of the originally filed IRS 2020 tax return **and** a signed copy of the IRS 2020 Form 1040X Amended Tax Return along with all schedules filed.

Individuals Who Filed Non-U.S. 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.