



2020–2021 Verification Worksheet
Verification Group 5
Office of Financial Aid

The U.S. Department of Education has selected your FAFSA for a process called “verification”. In this process, Polaris Career Center will be comparing information from your FAFSA with the 2018 federal tax returns or tax transcripts of you, your spouse (if you are married), and/or your parents. In some cases, other financial documents will also be reviewed. The U.S. Department of Education requires Polaris Career Center to process this information before awarding you any federal financial aid. If there are differences between the information reported on your FAFSA and your verification/financial documents, we will send corrections electronically to have your FAFSA reprocessed. In the event that this occurs, it may take up to a week to receive your updated FAFSA. We will notify you of your financial aid award upon completion of the verification process.

Step 1: Student Information

Last Name	First Name	Student’s M.I.	Last 4 digits of SS#
(____)_____			
Phone Number	Email Address	Class/Program	

Step 2: Family Information (Check the box indicated in the email-then **read carefully** as to whom to include below)

<input type="checkbox"/> Dependent Student: List the people in your parent’s household, excluding foster children. Only Include: <ul style="list-style-type: none"> ● Yourself ● Your parent(s), including their spouse ● Siblings and any other dependents IF your parent will provide <u>more than 50%</u> of their support from July 1, 2020-June 30, 2021. 	<input type="checkbox"/> Independent Student: List the people in your household, excluding foster children. Only Include: <ul style="list-style-type: none"> ● Yourself ● Your spouse, if married ● You or your spouse’s children, or any other dependents IF you will provide <u>more than 50%</u> of their support from July 1, 2020-June 30, 2021, even if the child does not live with you.
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Full Name	Age	Relationship	College*	Enrolled at Least Half Time?
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		<i>SELF</i>	<i>Polaris Career Center</i>	<i>Yes</i>

*Include the name of the college for any household member, excluding your parent(s), 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, 2020, and June 30, 2021.

Step 3: Tax Forms and Income Information

The best way to verify income is by using the IRS Data Retrieval Tool within the FAFSA on the web at www.fafsa.gov. Contact us if you need more information regarding how to use the IRS DRT.

Student:

Check ONE box below, and then...	Be prepared to submit the following documents:
<input type="checkbox"/> I filed a 2018 federal tax return	<ul style="list-style-type: none"> ● Update your FAFSA online by selecting the IRS Data Retrieval Tool option, OR submit your 2018 IRS federal tax return transcript (see attached instructions) OR submit your 2018 federal tax return and applicable schedules (please sign the first page at the top)
<input type="checkbox"/> I worked in 2018, but did not file a 2018 federal tax return	<ul style="list-style-type: none"> ● 2018 Verification of Non-Filing Letter from the IRS (see attached instructions); AND ● 2017 IRS wage & income transcript (see attached instructions) OR W2
<input type="checkbox"/> I did not work in 2018 and did not file a 2018 federal tax return	<ul style="list-style-type: none"> ● 2018 Verification of Non-Filing Letter from the IRS (see attached instructions)

Parent (only if student is considered a dependent student (see front):

Check ONE box below, and then...	Prepare to submit the following documents:
<input type="checkbox"/> I filed a 2018 federal tax return	<ul style="list-style-type: none"> ● Update your FAFSA online by selecting the IRS Data Retrieval Tool option, OR submit your 2018 IRS federal tax return transcript (see attached instructions) OR submit your 2018 federal tax return and applicable schedules (please sign the first page at the top)
<input type="checkbox"/> I worked in 2018, but did not file a 2018 federal tax return	<ul style="list-style-type: none"> ● 2018 Verification of Non-Filing Letter from the IRS (see attached instructions); AND ● 2018 IRS wage & income transcript (see attached instructions) OR W2
<input type="checkbox"/> I did not work in 2018 and did not file a 2018 federal tax return	<ul style="list-style-type: none"> ● 2018 Verification of Non-Filing Letter from the IRS (see attached instructions)

Step 4: Certification and Signatures

By signing this worksheet, I certify that all the information reported (including any IRS documents or other attachments) is complete and correct. If asked by the school to provide additional documentation, I will comply. If conflicting information is discovered as a result of the verification process, I authorize the financial aid office to make necessary changes to the FAFSA on my behalf.

Student's Signature _____ Date

Parent's Signature (Required if Dependent Student) _____ Date

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

Step 5: Verification of High School Completion

Check the option that applies. Attach documentation confirming the student’s high school completion status.

- Copy of student’s high school diploma
- Copy of student’s final official high school transcript that shows the date when the diploma was awarded
- A state certificate or transcript stating the student passed a state-authorized examination (GED, etc.)

- For students who completed secondary education in a country other than the U.S., a copy of the “secondary school leaving certificate”, or other similar document
- For students who were homeschooled in a state where state law requires the student to obtain a secondary school completion credential for homeschooling, a copy of that credential
- For students who were homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling, a transcript, or the equivalent, signed by the student’s parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

Step 6: Identity and Statement of Educational Purpose (To Be Signed at Polaris Career Center)

The student must appear in person at Polaris Career Center to verify his or her identity by presenting a 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 by the institution with the date it was received and reviewed and the name of the official at the institution authorized to collect the student’s ID.

- Valid, unexpired photo ID presented

In addition, the student must sign, in the presence of an institutional official, the following English or Spanish Statement (Spanish version available upon request):

Statement of Educational Purpose

I certify that I (please print your name) _____, am the individual signing this Statement of Educational Purpose and that the Federal Student Aid I may receive will only be used for educational purposes and to pay the cost of attending Polaris Career Center for 2020-21.

Signature _____ *Date* _____ *Last 4 digits of SS#* _____

Witnessed by _____ *Date* _____ *Position* _____

Please submit this worksheet via any of the following:

By Mail, Fax, or In Person:

Polaris Career Center
Attn: Allison Smith
7285 Old Oak Blvd
Middleburg Hts, OH 44130

Email: asmith@polaris.edu **Fax:** 440-891-7642

***Please note that we cannot accept photos of the document(s).**



Office of Financial Aid
Instructions for Requesting Tax Documents from the IRS

IRS Data Retrieval Tool

1. Log in to your FAFSA at <https://fafsa.gov>
2. Select "Make Corrections"
3. Click the "Financial" tab
4. Select that you (or your parents) have "already completed" taxes
5. Click "view options to link to the IRS"
6. Click "Link to IRS"
7. Select "OK" to the prompts
8. Complete by entering all address information EXACTLY as it appears on your 2018 tax return
9. Click "Submit"
10. Review the information for accuracy, then check box next to "Transfer my Tax Information"
11. Click "Transfer Now"
12. Go to the end of your FAFSA and sign with your FSA ID (also with Parent's FSA ID, if applicable)
13. Click "Submit"

IRS Tax Return Transcript

1. Go online to www.irs.gov
2. In the right column, click "Get my Tax Record"
3. Read the information and select "Get Transcript Online"
 - If you are unable to use "Get a Transcript Online", select "Get Transcript by Mail" to have your 2018 Tax Return Transcript mailed to you. Please note that it may take up to 10 business days to receive.
4. Follow the prompts to register a username
5. Once registered, be sure to request your 2018 Tax **Return** Transcript
6. You may also request transcripts by phone at 1-800-908-9946 or the IRS2GO mobile app

Wage and Income Transcript

1. Go online to www.irs.gov
2. In the right column, click "Get my Tax Record"
3. Read the information and select "Get Transcript Online"
 - If you are unable to use "Get a Transcript Online", select "Get Transcript by Mail" to have your 2018 Wage & Income Transcript mailed to you. Please note that it may take up to 10 business days to receive.
4. Follow the prompts to register a username
5. Once registered, be sure to request your 2018 **Wage & Income** Transcript

Verification of Non-Filing Letter

1. Go online to www.irs.gov
2. In the right column, click "Get my Tax Record"
3. Read the information and select "Get Transcript Online"
 - If you are unable to use "Get a Transcript Online", select "Get Transcript by Mail" to have your Verification of Non-Filing Letter mailed to you. Please note that it may take up to 10 business days to receive.
 - If you are unable to use "Get Transcript Online" or "Get Transcript by Mail", you will need to complete and submit an IRS form 4506-T to the IRS. Please check box 7 to request a Verification of Non-Filing Letter. You may get a copy of this form at irs.gov (click on the Forms & Instructions) link.
4. Follow the prompts to register a username
5. Once registered, be sure to request your 2018 **Verification of Non-Filing Letter**