

# Pennsylvania College of Art & Design

## Independent Verification Instructions

**Background:** Your FAFSA was selected for review in a process called “Verification.” PCA&D is required to compare your FAFSA with requested documents and the attached worksheet. Your financial aid cannot be processed until all requested information is received. Failure to complete the verification process in a timely matter may result in the loss of financial aid eligibility. This review must be conducted under the financial aid program rules (34 CFR, Part 668). Any changes to your FAFSA made necessary by the verification process will be forwarded to federal processors by PCA&D.

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### Step 1: Documentation

- Refer to the enclosed missing information letter to see if we are requesting an IRS Tax Information for **yourself and your spouse (if married)**. *If we are not requesting any IRS Tax Information, skip to Step 2.*
- If we require IRS Tax Information you will see it listed as one of your required documents on the accompanying letter, showing as “not received”. If required, the preferred method to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](http://FAFSA.gov) OR order an IRS tax return transcript (see below).

#### 1. IRS-DRT:

To re-submit the 2020-2021 FAFSA and select the IRS data retrieval option (IRS-DRT), log back into your FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov), you will be able to make corrections to your submitted FAFSA without having to start over. The data retrieval tool is available 2-3 weeks after filing taxes electronically on-line or 6-8 weeks after filing by hard copy. Once corrected using IRS-DRT, re-submit your FAFSA.

Or

2. If you/or your spouse (if married) are unable or choose not to use the IRS-DRT in FAFSA, and instead will provide a 2018 IRS Tax Return Transcript(s) or a **signed** copy of the 2018 federal income tax return and applicable schedules.

2018 IRS Tax Return Transcript may be obtained via the following:

Online Request - Go to [www.IRS.gov](http://www.IRS.gov), click on “Get Your Tax Record.” Click “Get Transcript Online.” Make sure to request the “Return Transcript” and **NOT** the “Account Transcript.”

Telephone Request - 1-800-908-9946. Usually available within 10 business days.

Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T. Usually available within 10 business days.

**Please note that the Verification process will not be complete until the FAFSA is (re)submitted using the IRS-DRT or required Tax Transcripts are received. Do NOT send copies of state or local tax returns to the school.**

### Step 2: Verification Worksheet

- Complete this worksheet in its entirety – Complete Student (and spouse if married) information
- Affix all required signatures

### Step 3: Submit Documentation

- Submit this worksheet along with any other financial documents we requested in Step 1 to the Financial Aid Office. Refer to the accompanying letter for list of documents. If we are requesting “Documentation of Other Untaxed Income” please be sure to thoroughly complete sections 4, 6 & 8 on the worksheet.
- Scanned/emailed or faxed copies are acceptable.
- If you or your spouse owns a business, please include the additional IRS tax form “Schedule C or C-EZ”

**SECTION 1: STUDENT INFORMATION**

Student SS#		Phone #	
First Name		Last Name	Middle Initial

**SECTION 2: FAMILY (HOUSEHOLD) INFORMATION**

**INDEPENDENT:** List yourself, your spouse (if applicable) and your or your spouse’s children and other people who live with you and will receive more than half of their support from you (and/or your spouse) between 07/01/19 through 06/30/20.

Full Name	Age	Relationship	College	Enrolled at Least Half Time (Yes or No)
		Self	Pennsylvania College of Art & Design	

\*\* Include the name of the college for any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between 07/01/19 and 06/30/20. If more space is needed, attached a separate sheet.

**SECTION 3: TAX FORMS AND INCOME INFORMATION FROM 2018**

**Complete this section for any person you listed above (excluding children) who worked, but did not file taxes for 2018.**

Non-Tax Filer’s Name	Name of Employer(s) in 2018	Amt. Earned in 2018 (include W-2s)

**SECTION 4: FOOD STAMPS (SNAP)**

List the amount of Food Stamp benefits received in 2018 for the people reported in Section 2. Also provide a statement from the applicable agency or alternative documentation that shows proof of benefits received in 2018.	Full Name	Amount received
		\$
		\$
		\$
		\$
		\$

**SECTION 5: ADDITIONAL 2018 FINANCIAL INFORMATION**

Answer each question by filling in the correct amount. If a question is left blank, it will be assumed to be zero.	Student/Spouse
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	
Taxable student grant and scholarship aid <b>if you reported it to the IRS in your adjusted gross income</b> . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. <b>Do not include scholarships reported on your 1098-T.</b>	
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay.	
Earnings from work under a cooperative education program offered by a college.	

**SECTION 6: UNTAXED 2018 INCOME**

<b>Answer each question by filling in the correct amount. If a question is left blank, it will be assumed to be zero.</b>	Student/Spouse
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	
Child support received for any of your children. Don't include foster care or adoption payments.	
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	
Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
Other untaxed income not reported on the previous questions, such as workers' compensation, disability, etc. <b>Don't include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements, foreign income exclusion or credit for federal tax on special fuels.	
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	

**SECTION 7: ASSET INFORMATION**

<b>Answer each question by filling in the correct amount. If a question is left blank, it will be assumed to be zero.</b>	Student/Spouse
Total current balance of cash, savings and checking accounts on the day you filed your FAFSA.	
Net worth of your investments, including real estate on the day you filed the FAFSA. (Don't include the home in which you live. Net worth means current value minus debt.)	
Net worth of current businesses and /or investment farms on the day you filed your FAFSA. (Don't include a family farm or business with 100 or fewer full-time equivalent employees.)	

**SECTION 8: FOR MARRIED STUDENTS FILING JOINTLY**

Enter the combined total wages of you and your spouse.	\$	Wage locations <b>Form 1040:</b> Lines 7 + 12 + 18 + Box 14 of IRS Schedule K-1 <b>1040A:</b> Line 7 <b>1040EZ:</b> Line 1
Of the combined total wages, how much was earned by you? FAFSA #38	\$	
Of the combined total wages, how much was earned by your spouse? FAFSA #39	\$	

**SECTION 9: CHILD SUPPORT PAID**

Complete this section if you, your spouse (if married) paid child support in 2018.

Name of individual paying child support	Amount paid	Child support recipient	Name of the child (children) for whom support was paid

**SECTION 10: PRINT AND SIGN THIS WORKSHEET**

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student \_\_\_\_\_ date \_\_\_\_\_ Spouse (if married) \_\_\_\_\_ date \_\_\_\_\_