

**2014-2015  
VERIFICATION WORKSHEET  
INDEPENDENT STUDENT**



OFFICE OF STUDENT FINANCIAL AID  
9201 University City Boulevard  
Charlotte, NC 28223-0001  
Phone: (704) 687-5504  
Fax: (704) 687-1461

Your application was selected for a review process called **Verification**. In this process, we will be comparing information from the Free Application for Federal Student Aid (FAFSA) with your **2013 federal tax information**. Forms can be submitted in person, via U.S. mail or fax at 704-687-1461.

**PRIORITY DEADLINE: JULY 1, 2014.** All documents must be received in the financial aid office by the priority date to ensure students are awarded financial aid by the tuition payment date.

What Happens After I Submit My Information: Once you begin submitting documentation the Financial Aid Office will:

1. Review the documents to be sure they are complete. **This can take two to three weeks** depending upon the volume of all student paperwork being submitted.
2. If the documents are incomplete (missing signatures, questions are left blank, etc.) we will request that the documents be resubmitted with the information necessary to make them complete. **NOTE: Each time you have to resubmit information the process starts over. Because processing can take two to three weeks you need to be sure your documents are COMPLETE when you first submit them.**
3. Once all documents are complete, the Financial Aid Office will review the information and compare it with the information reported on the FAFSA.
4. During the review, if the information submitted raises additional questions for which we need clarification, we may ask for more documentation. **NOTE: If you have to submit additional information the process starts over so respond to these requests as quickly as possible.**

Required Tax Information

- A. If you did not use IRS Data Retrieval Tool when completing your FAFSA you have two options:
  1. Log back into your FAFSA and use the IRS Data Retrieval Tool to update your tax information or
  2. Print a Tax Return Transcript from the IRS.
- B. If you were not eligible to use the IRS Data Retrieval Tool, you MUST request a Tax Return Transcript from the IRS.
- C. If you file an amended tax return, you MUST contact the Office of Student Financial Aid (OSFA) for additional instructions.

How to use the IRS Data Retrieval Tool

1. Go to [www.fafsa.gov](http://www.fafsa.gov)
2. Click the "Login" button on the right side of the screen
3. Enter your information and click "Next"
4. Click on "Make Corrections to a Processed FAFSA"
5. Click on the "Financial Information" tab
6. Answer "Already Completed" to the question, "Have your parents filed their IRS Income tax return?", then by checking "None of the above" (if that is accurate) to the next question about the filing status, the "Link to IRS" button will appear. (If you cannot accurately check "None of the above", you will need to submit an IRS Tax Transcript.)
7. Click on the "Link to IRS" button (you will be directed that you are leaving the FAFSA webpage).
8. Enter the information asked by the IRS page and then click "Transfer Now" to FAFSA.

How to Obtain a Tax Return Transcript from the IRS

1. Be sure to request a **Tax Return Transcript, NOT an Account Transcript.**
2. Do NOT have transcripts sent directly to the UNC Charlotte Office of Financial Aid.
3. On line request at [www.irs.gov](http://www.irs.gov). Follow these steps:
  - a. On the main page under Tools, click "Get Transcript of Your Tax Records"
  - b. Click "Get Transcript Online"
  - c. Click "Create Account" and enter your information
  - d. Check the email account that you entered for the Confirmation Code (Do not close the IRS page)
  - e. Enter the Confirmation Code in the space provided on the IRS page and click "Verify Email Confirmation Code"
  - f. Enter the Information on the next two pages
  - g. Click on the year transcript that you wish to print. Your transcript will open in a new window where you can print it.
4. Telephone Request: Automated 800-908-9946
5. Paper Request: IRS form 4506T – Must be used if you have moved since filing your taxes. The form can be downloaded at [www.irs.gov](http://www.irs.gov).

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Complete all sections. Do not leave blanks (If the answer is Zero, write \$0). All forms must have required signatures.  
**You will not receive a financial aid award until verification is complete.**

Student Name \_\_\_\_\_ UNC Charlotte Student ID \_\_\_\_\_  
Last First Middle

Telephone ( \_\_\_\_\_ ) \_\_\_\_\_ E-mail \_\_\_\_\_

**SECTION A – FAMILY INFORMATION: List the members of your household. Attach a separate sheet if necessary.**

1. Student Marital Status as listed on FAFSA:

- Married/Remarried     Single     Divorced/Separated     Widowed

Date you were married, separated, divorced or widowed: Month \_\_\_\_\_ Year \_\_\_\_\_

2. In the box below, list the people in your household including:

- Yourself and your spouse (if you have one), and
- Your children (even if they don't live with you) and other people if they meet the following criteria:
  - they now live with you, and
  - they now get more than half of their support from you, and
  - they will continue to get this support between July 1, 2014 and June 30, 2015.
- Write in the name of the college for any household member, who will be attending college at least half-time between July 1, 2014 and June 30, 2015.

NAME	AGE	RELATIONSHIP	COLLEGE
		SELF	UNC Charlotte

**SECTION D – INCOME TAX INFORMATION**

STUDENT'S INCOME INFORMATION (check one box only)	SPOUSE'S INCOME INFORMATION (check one box only)
<input type="checkbox"/> Check here if you will not file a 2013 US Income Tax Return. → Continue to section <b>E</b>	<input type="checkbox"/> Check here if you will not file a 2013 US Income Tax Return. → Continue to section <b>E</b>
<i>If you chose not to use IRS Data Retrieval Tool</i> <input type="checkbox"/> Check here if you will go back into the FAFSA to use IRS Data Retrieval Tool to update your FAFSA. If not, you must attach a copy of your tax return transcript to this form. → Skip to section <b>F</b>	<i>If you chose not to use IRS Data Retrieval Tool</i> <input type="checkbox"/> Check here if you will go back into the FAFSA to use IRS Data Retrieval Tool to update your FAFSA. If not, you must attach a copy of your tax return transcript to this form. → Skip to section <b>F</b>
<input type="checkbox"/> Check here if you were not eligible to use IRS Data Retrieval Tool. You MUST attach a copy of your tax return transcript to this form. → Skip to section <b>F</b>	<input type="checkbox"/> Check here if you were not eligible to use IRS Data Retrieval Tool. You MUST attach a copy of your tax return transcript to this form. → Skip to section <b>F</b>

**SECTION E – EARNED INCOME INFORMATION**

If you and/or your spouse earned income by working in 2013 but did not file a tax return, list all employers and amounts of earned income below (for the person who did not file a tax return), and they must ATTACH W2's (if provided by employer) to this form. If either you or your spouse had no income, complete and attach the Supplemental Income Statement. This form can be located at <http://finaid.uncc.edu/forms-and-publications>.

Employer Name	Student Amount	Spouse Amount	IRS W2- Attached?
	\$	\$	<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

**SECTION F – ADDITIONAL INFORMATION (You cannot leave blanks. If Zero, enter \$0)**

	Student	Spouse
Payments to tax deferred pension and retirement savings plan listed on W-2 box 12a through 12d with codes D,E,F,G,H and S. (W2 is required as documentation)		
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). <b>(Do not include donation to religious organizations.) Ex: Pastor Living in Church Housing.</b>	\$	\$
Other monthly untaxed income not reported, such as workers' compensation, disability, etc. <b>Don't include student aid, earned income credit, 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 (if you are non-tax filer), benefits from flexible spending, foreign income exclusion, or credit for federal tax on special fuels.</b> <b>Source:</b> _____	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$	\$
Student grant and scholarship aid <b>reported to the IRS in your adjusted gross income.</b> Include AmeriCorps benefits (awards, living allowances and interest accrual payments) as well as grant and scholarship portions of fellowships and assistantships. <b>This amount is listed as "SCH" on line 7 of your federal tax return.</b>	\$	\$
Child support received for all children. Do not include foster care/adoption payments.	\$	\$
Money received or paid on your behalf (e.g. bills), not reported anywhere else on this form.		

**SECTION G – SIGN THIS FORM**

Each person signing this form certifies that all information reported is true and complete to the best of his/her knowledge. Individuals, who purposely provide false or misleading information on this worksheet may be fined, sent to prison or both.

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_