



# 2020-2021 Verification Worksheet

## Federal Student Aid Programs

Your application was selected for review in a process called “Verification.” In this process, your school will be comparing information from your FAFSA application with copies of yours and your parent(s) 2018 Federal tax returns or transcripts, or with W-2 forms or other financial documents. The law states we have the right to ask you for this information before awarding Federal aid. If there are differences between your FAFSA application information and your financial documents, you or Hofstra University may need to make corrections electronically or by using your Student Aid Report (SAR).

Submit this information to the Office of Student Financial Services (Financial Aid) **immediately** since federal and/or University need-based aid awarded is **estimated** until this process is complete. **Failure to complete verification in a timely manner may lead to cancellation of aid.** Upon review of the documentation you submit, additional information may be required; notification of such will be made as quickly as possible. You will be notified if FAFSA corrections result in changes/cancellation of award(s).

1. Submit the completed **2020-2021** Dependent Verification Form. Make sure the form is **signed by both the student and parent**. This form contains 4 pages and needs to be filled out completely; if the answer is zero or if the question does not apply to you, write “0”, **do not leave blank**.
2. Submit **2018 Federal Tax Return(s) or Transcript(s) with all applicable schedules** for both student and parent(s), if filed.
  - You can obtain a “Federal Tax Return Transcript” by going to [www.irs.gov/transcript](http://www.irs.gov/transcript). Here you now have the option of receiving your tax transcript online instantly. For security purposes, you will be prompted a series of questions that are based on your financial history. If this is not an option for you, you may request a tax transcript online to be mailed to your home address or by calling the IRS at 1-800-908-9946. Please allow 7-10 business days to receive. Make sure to request the “Return Transcript” and not the “Account Transcript”.
  - In most cases, for electronic filers, a 2018 IRS Tax Return Transcript may be requested from the IRS within 2-3 weeks after the 2018 IRS income tax return has been accepted by the IRS. Generally, for filers of 2018 paper IRS income tax returns, the Tax Transcript may be requested within 8-11 weeks after the paper return has been received by the IRS.

**The best way 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). Please note, this option is available to *most* tax filers, not all. If you are unable to utilize this option, you can provide a signed and dated copy of the 1040 Tax Return or request an “IRS Tax Return Transcript”.**

### A. Student Information

\_\_\_\_\_  
 Last name                      First name                      M.I.

7  
 Hofstra ID Number

\_\_\_\_\_  
 Address (include apt. #)

\_\_\_\_\_  
 Date of birth                      /

\_\_\_\_\_  
 City                                      State                                      Zip Code

\_\_\_\_\_  
 Phone number (include area code) / Cell

## B. Family Information

List the people in your parent(s)' household, including:

- yourself,
- your parent(s) :
  - **If living together**, regardless of gender or marital status, list both your legal parents
  - **If NOT living together** and are considered separated or divorced, only report the parent you live with
    - If your parent is legally remarried list their spouse (stepparent) *regardless of gender*
- your parents' other children, even if they do not live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2020 through June 30, 2021, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2020 through June 30, 2021

| Full Name | Age | Relationship | College Enrollment<br>Between 7/1/20 – 6/30/21<br>(Excluding parents' college) |
|-----------|-----|--------------|--|
|           |     | Self         | Hofstra University   |
|           |     |              |  |
|           |     |              |  |
|           |     |              |  |
|           |     |              |  |
|           |     |              |  |
|           |     |              |  |

## C. Student's Tax Forms and Income Information (all applicants)

1. Check only one box below. Tax transcripts include the 2018 IRS transcript from filing Form 1040 or a tax return from Puerto Rico. Tax transcripts can be obtained by going to [www.irs.gov/transcript](http://www.irs.gov/transcript) or by calling the IRS at 1-800-908-9946.

- Check here if you are attaching a signed copy of your tax return with all applicable schedules or transcript.
- Check here if you successfully utilized the IRS data retrieval tool online at [FAFSA.gov](http://FAFSA.gov).
- Check here if you will not file, are not required to file a 2018 U.S. Income Tax Return and *were claimed as a dependent on your parent(s)' tax return.*
  - **If you earned wages in 2018, you must submit all W-2 forms and complete question #2.**
- Check here if you will not file, are not required to file a 2018 U.S. Income Tax Return and *were **not** claimed as a dependent on your parent(s)' tax return.*
  - **If you earned wages in 2018, you must submit all W-2 forms and complete question #2.** You may be requested to complete a non-filer form if you do not submit any W-2s

2. List below your employer(s) and any income received in 2018 (*You must provide all W-2 forms or other earnings statements with this form*).

| Sources | 2018 Income |
|---------|-------------|
|         | \$          |
|         | \$          |
|         | \$          |

## D. Parent(s)' Tax Forms and Income Information

1. Check only one box below. Tax transcripts include the 2018 IRS transcript from filing Form 1040 or a tax return from Puerto Rico. Tax transcripts can be obtained by going to [www.irs.gov/transcript](http://www.irs.gov/transcript) or by calling the IRS at 1-800-908-9946.
  - Check here if you are attaching a signed copy of your parents' tax return with all applicable schedules or transcript.
  - Check here if you successfully utilized the IRS data retrieval tool online at [FAFSA.gov](http://FAFSA.gov)
  - Check here if your parent(s) will not file and are not required to file a 2018 U.S. Income Tax Return. Please provide a non-filing letter from the IRS, which can be obtained from [www.irs.gov/transcript](http://www.irs.gov/transcript).
    - **If you earned any wages in 2018 you must submit all W-2 forms and complete question #2.**
  
2. If you did not file and are not required to file a 2018 Federal income tax return, provide a non-filing letter from the IRS and list below your employer(s) and any income received in 2018 (***You must provide all W-2 forms or other earnings statements with this form.***)

| Sources | 2018 Income |
|---------|-------------|
|         | \$          |
|         | \$          |
|         | \$          |
|         | \$          |
|         | \$          |

## E. Additional Financial Information and Untaxed Income

Use the tables below to report annual (not monthly) amounts as indicated on your 2018 **TAX RETURN**.

Tax returns include the 2018 IRS Form 1040, a tax return from Puerto Rico or a foreign income tax return.

If the amount is zero, or the question does not apply to you, write "0", **do not leave blank.**

| PARENT'S | 2018 Additional Financial Information  | STUDENT'S |
|----------|--|-----------|
| \$       | a. Education Credits (Hope and Lifetime Learning tax credits ) from IRS Form 1040 – Schedule 3 line 50.  | \$        |
| \$       | b. Taxable earnings from need-based employment programs, such As Federal Work-Study and need-based employment portions of fellowships and assistantships.  | \$        |
| \$       | c. Grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships ( <b>DO NOT</b> include Hofstra scholarships or grants). | \$        |
| \$       | d. Combat pay or special combat pay.<br>Only enter the amount that was taxable and included in your adjusted gross income.   | \$        |
| \$       | e. Earnings from work under a cooperative education program offered by a College ( <b>DO NOT</b> include earnings from any Hofstra work program).  | \$        |

**PARENT’S**

**2018 Untaxed Income**

**STUDENT’S**

|            |  |    |
|------------|--|----|
| \$         | a. 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. Don’t include amounts reported in code DD (employer contributions toward employee health benefits). | \$ |
| \$         | b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1- line 28 + line 32.   | \$ |
| \$         | c. Child support <u>received</u> for all children in your household. <b>(DO NOT</b> include foster care or adoption payments).   | \$ |
| \$         | d. Tax exempt interest income from IRS Form 1040 - line 2a.  | \$ |
| \$         | e. Untaxed portions of IRA distributions or pensions from IRS Form 1040 – line 4a minus 4b. <b>Exclude ROLLOVERS.</b> If negative, enter “0”. You will need to supply Schedule 1 of your tax return if answer is not “0”   | \$ |
| \$         | f. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don’t include the value of on-base military housing or the value of a basic military allowance for housing.  | \$ |
| \$         | g. Veterans non-education benefits such as Disability Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.  | \$ |
| XXXXXXXXXX | h. Money received, or paid on your behalf (e.g. bills), in 2018, not reported elsewhere on this form.  | \$ |

**F. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date. Please provide “original” signatures.

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

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Parent Date

You may submit the verification and requested forms by uploading them on the **my.hofstra.edu** portal. For instructions visit **hofstra.edu/fasteps**.

**Questions? Please call 516-463-8000 and a Student Financial Services Representative will assist you.**