

2020–2021 DEPENDENT VERIFICATION WORKSHEET

You have been selected for verification by the Department of Education. Please note that 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.ed.gov](https://fafsa.ed.gov). In most cases, no further documentation is needed to verify **2018 IRS income tax return** information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic filers, 2018 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2018 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2018 paper IRS income tax returns, the 2018 IRS income tax return information is available for the IRS DRT within 8–12 weeks after the 2018 paper IRS income tax return has been received by the IRS. If you are not able to use the IRS DRT, you can request a tax return transcript from the IRS.

A **2018 IRS Tax Return Transcript** may be obtained through:

- 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.
- Automated Telephone Request – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.

I. Student Information:

_____ @ _____
Student’s ID Number (if known)

Student’s Last Name

Student’s First Name

M.I.

Last 4 digits of Student’s SSN

Student’s Date of Birth

Student’s Email Address

() _____
Student’s Phone Number

Student's Last Name

Student's First Name

M.I.

**II. Number of Household Members and Number in College:
Complete Section A then Section B.**

A. List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2020, through June 30, 2021, or if the other children would be required to provide parental information if they were completing a FAFSA for 2020–2021. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people, if they now live with the parents, and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2021.

AND

B. Number in College:

- Include in the space below information about any household member (excluding the parents) 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 July 1, 2020 and June 30, 2021, and include the name of the college.

DO NOT LEAVE THIS SECTION BLANK.

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

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		Self		
		FAFSA Parent 1	N/A	N/A
		FAFSA Parent 2 (if parent 1 is currently married)	N/A	N/A

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student's Last Name

Student's First Name

M.I.

III. Student Tax Information

DO NOT COMPLETE BOTH SECTIONS. Only complete Section A OR B.

A. Student 2018 Tax Filers (Non-filers skip to Section B)

Instructions: Only complete this section if the student filed or will file a 2018 IRS income tax return. *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.* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT, if that information was not changed by the FAFSA filer.

Check the box that applies:

- The student has used or plans to use the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2018 IRS Tax Return Transcript(s)**.
- The student has filed a foreign tax form or tax return with Puerto Rico, another US Territory, or Freely Associated State and has attached a copy of this form.

OR

B. Student Non-Tax Filers

Instructions: Complete this section if the student will not file and is not required to file a 2018 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2018.
- The student was employed but was not required to file a 2018 income tax return and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 IRS W-2 forms issued to the student by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2018
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Student's Last Name

Student's First Name

M.I.

IV. Parent Tax Information

DO NOT COMPLETE BOTH SECTIONS. Only complete Section A OR B.

A. Parent 2018 Tax Filers (Non-filers Skip to Section B)

Instructions: Only complete this section if the parents filed or will file a 2018 IRS income tax return(s). *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.* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- The parents have used or plan to use the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2018 IRS Tax Return Transcript(s)**.
- The parents filed separate 2018 IRS income tax returns and the IRS DRT cannot be used. The parents will provide **2018 IRS Tax Return Transcripts** for each parent.
- The parents have filed a foreign tax form or tax return with Puerto Rico, another US Territory, or Freely Associated Stat and have attached a copy of this form.

OR

B. Parent Non-Tax Filers

Instructions: Complete this section if the parents will not file and are not required to file a 2018 income tax return with the IRS. Parents must also provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.

Check the box that applies:

- Neither parent was employed, and neither had income earned from work in 2018.
- One or both parents were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2018
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Student's Last Name_____
Student's First Name_____
M.I.

V. High School Completion Status

Provide **one** of the following documents to indicate the student's high school completion status when the student begins college in 2020–2021:

- A copy of the student's high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), 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.

Student's Last Name_____
Student's First Name_____
M.I.**VI. Identity and Statement of Educational Purpose
(To Be Signed at the Institution)**

Please note that the student must complete either number one **or** two below. Number one must be signed at the institution. Option two must be **notarized**.

1. Must Be Signed at the Institution

The student must appear in person **at Hawaii Pacific University's Financial Aid Office** 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 with the date it was received, and the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, in the presence of the institutional official, the following:

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending _____
for 2020–2021.

(Name of Postsecondary Educational Institution)_____
(Student's Signature)_____
(Date)_____
@
(Student's ID Number)_____
(Printed HPU Representative's Name)_____
(HPU Department/Office)_____
(Representative's Signature)_____
(Date)

Student's Last Name_____
Student's First Name_____
M.I.**2. Must Be Signed With Notary**

If the student is unable to appear in person at Hawaii Pacific University Financial Aid Office to verify his or her identity, the student must provide:

- a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- b) The **original notarized** Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending
for 2020–2021.

(Name of Postsecondary Educational Institution)_____
(Student's Signature)_____
(Date)_____
@
(Student's ID Number)**Notary's Certificate of Acknowledgement**

State of _____

City/County of _____

On _____, before me, _____
(Date) (Notary's name)personally appeared, _____, and provided to me
(Printed name of signer)on basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(Seal)

(Notary signature)My commission expires on _____
(Date)

VII. Certifications and Signatures

Each person signing below **certifies** that all of the information reported is complete and correct. The student and one parent, whose information was reported on the FAFSA, must **hand sign in ink** and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

(Electronic Signatures will not be accepted)

Print Student's Name

@

Student's ID Number

Student's Signature (Required)

Date

Parent's Signature (Dependent Students Only)

Date

Submit in Person: **Hawai'i Pacific University Financial Aid Office**
500 Ala Moana Blvd, Suite 5A
Honolulu, Hawai'i 96813

Submit by Email: financialaid@hpu.edu

Submit by FAX: (808) 544-0884