



2021-2022 INDEPENDENT VERIFICATION WORKSHEET FEDERAL STUDENT AID PROGRAMS

4240 Campus Drive Lima, OH 45804 | (419) 995-8802 | Fax (419) 995-8112 | FinAid@RhodesState.edu | www.RhodesState.edu

Please complete and submit this form to the Financial Aid Office as soon as possible. Federal financial aid will not be disbursed until your verification is complete. Incomplete forms or missing documentation will not be processed until all information is provided to the College. Documents must be submitted **30 days prior to starting your classes** and **must be physically signed by you and your spouse, if married, no electronic (typed) signatures will be accepted.** *Submitting documents less than 30 days before the start of classes decreases the College's ability to have your financial aid eligibility finalized for the start of class and may cause a late fee to be assessed. Alternative payments may be arranged with the Business Office to avoid this fee.*

Submit documentation to:

Rhodes State College, Financial Aid Office
4240 Campus Drive, Lima, Ohio 45804
Fax: 419-995-8112
Email: finaid@RhodesState.edu

A. Student Information - please print clearly

_____	_____	_____	R _____
Last Name	First Name	M.I.	Student ID (R#)
_____			_____
Address (include apt. no.)			Date of Birth
_____			_____
City, State, Zip			Phone Number (Include area code)

See the [Worksheet Guide](#) for additional information to help you answer sections B, C, and D.

B. Household Information - please read carefully and answer accordingly

Student: What is your current marital status as reported on your FAFSA? (check one)

- Married/Remarried
 Divorced/Separated
 Unmarried, but living together
 Widowed
 Never Married

Date of Current Marriage (if married/remarried): _____

Date of Most Recent Divorce/Separation or date Widowed (if currently divorced/separated or widowed): _____

Below, list the name of your current spouse (if married):

Full Name	Date of Birth	Relationship to Student	*Name of College <i>(if applicable)</i>	*Enrolled at Least Half-Time
		Spouse		<input type="checkbox"/> Yes <input type="checkbox"/> No

Below, list any other individuals you will support between July 1, 2021 and June 30, 2022. You will include:

- Your child(ren)
- Other people, ONLY IF they live with you/your spouse and you will provide more than half of their support, through June 30, 2022. *If additional space is needed, attach a separate page with Name and R# to this form.*

Full Name	Date of Birth	Relationship to Student	*Name of College <i>(if applicable)</i>	*Enrolled at Least Half-Time
				<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
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

**If your child(ren), spouse (if married), or other household members are enrolled in college, please list the name of the college and if they will be enrolled at least half-time (six credit hours) in the 2021-2022 aid year.*





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Student Name _____

Student ID (R#) _____

C. Tax Information - Student and spouse please indicate if you filed taxes or did not file taxes below. If you filed and did not use the DRT, submit your 2019 Tax Return Transcript. If you did not file, submit your 2019 W-2's/1099's and 2019 Verification of Non-Filing Letter.

	STUDENT:	SPOUSE:
I FILED 2019 Taxes	<input type="checkbox"/> I filed a joint return with my spouse and used the IRS Data Retrieval Tool (DRT) through the FAFSA.	<input type="checkbox"/> I filed a joint return with my spouse and used the IRS Data Retrieval Tool (DRT) through the FAFSA.
	<input type="checkbox"/> I did not file a joint return and am attaching my 2019 IRS Tax Return Transcript from the IRS.	<input type="checkbox"/> I did not file a joint return and am attaching my 2019 IRS Tax Return Transcript from the IRS.
I DID NOT FILE 2019 Taxes	STUDENT:	SPOUSE:
	<input type="checkbox"/> I was employed, but was not required to file. Submit copies of your W-2's/1099's AND your 2019 Verification of Non-Filing Letter. Employer _____ Employer _____ Employer _____	<input type="checkbox"/> I was employed, but was not required to file. Submit copies of your W-2's/1099's. Employer _____ Employer _____ Employer _____
	<input type="checkbox"/> I was not employed, did not have income, and am not required to file a 2019 Federal Tax Return. I am attaching my 2019 Verification of Non-Filing Letter from the IRS.	<input type="checkbox"/> I was not employed, did not have income, and am not required to file a 2019 Federal Tax Return. I am attaching my 2019 Verification of Non-Filing Letter from the IRS.

D. 2019 Income Exclusions and Untaxed Income - List income exclusions and untaxed income that were received in 2019. The information requested below was to be reported on your FAFSA. **Additional information may be requested upon review of verification documents and FAFSA information. Check your STARS online account and/or Rhodes State email.**

Did you, the student, work on-campus and earn Federal Work Study Dollars during 2019?

- Yes No

Did you or your spouse receive any of the following: (Check box if yes, then submit documentation showing amount received.)

- Child support paid/received for any of your children. (Do NOT include foster care or adoption payments. Must submit and complete "Verification - Child Support Paid/Received" worksheet.)
- Payments to tax-deferred pensions and savings plans (W-2 Form boxes 12a-12d, codes D, E, F, G, H, and S.)
- Veterans' non-educational benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensations (DIC) and/or VA Educational Work-Study allowances.
- *Commissioned Officer's - Combat pay or special combat pay. (Only enter the amount that was taxable. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q. For questions please contact the Financial Aid Office)
- Any untaxed income or benefits, such as worker's compensation, disability, etc. (Do not include student aid, untaxed Social Security benefits, or Supplemental Security Income.)

E. Certification and Signatures – The student and spouse (if married) must sign and date. (Inked signatures required)

By signing this worksheet, I/we certify that the information reported on it is complete and correct.

Student Signature

Date

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

Spouse Signature (if married)

Date



2021-2022 INDEPENDENT VERIFICATION WORKSHEET GUIDE

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Use this Worksheet Guide to assist you in completing the Verification Worksheet. Below is detailed information for sections B, C, and D of the Verification Worksheet.

Your FAFSA was selected for review in a process called "Verification." In this process, we will be comparing information from your FAFSA using this worksheet and documents you will submit to the Rhodes State College Financial Aid office. Federal regulations state Rhodes State College has the right to ask you for this information before awarding any Federal Student Aid. If there are differences between your FAFSA and the submitted documents, the Financial Aid office will make corrections electronically before awarding your Federal Student Aid.

B. Household Information

Marital Status	Required by the U.S. Department of Education
Married/Remarried	If you are married on the day you complete your FAFSA, you must include your spouse's income, even if you were not married during the requested tax year.
Divorced/Widowed	Divorced - A student who was married, even briefly, whose divorce was finalized through the court and is single on the day they complete the FAFSA. <i>If you are currently going through a divorce and it is not finalized, you must mark "Separated."</i> Widowed - A student who was married, even briefly, whose spouse is now deceased and is single on the day they complete the FAFSA.
Separated	A student who is legally married and has chosen to live separate from his/her spouse, at separate addresses, as though they were not married. <i>If you and your spouse are separated, but living together, you will mark "Married/Remarried."</i>
Never married/Single	A student that has never been married. <i>If you were ever married, you must mark married/remarried, divorced/widowed, or separated.</i>

Other Household Members

Student's/Spouse's children (even if they do not live with them) - who will receive more than half of their support (over 50%) from the student/spouse from July 1, 2021 - June 30, 2022. (This **does not** include children that you or your spouse pay child support for.)

NOTE: The FAFSA does not have the same dependency rules as the IRS. Contact the Financial Aid Office for help.

Student's/Spouse's adult children who are under the age of 24, unmarried, are not a veteran of or an active duty member of the military, who do not live with you; but would be required to put parental information on the FAFSA if they also attend college.

Other people, **ONLY IF** they live with the you and your spouse (if married) now **AND** receive more than half their support (over 50%) from you **AND** will continue to receive more than half of their support from you through June 30, 2022.

Do not include foster children for whom you or your spouse (if married) receive a subsidy for.

Do not include children for whom you or your spouse (if married) pay child support for outside the home.

Support includes: housing (rent/mortgage assistance), utilities (gas, electric, etc.), cell service, cable/internet, transportation costs (gas, insurance, etc.), food, clothing, medical, childcare, personal expenses, etc.

C. Tax Information - FAFSA requirements for Student/Spouse who FILED Taxes

Provide official tax information for Student and Spouse (if married) -> TWO OPTIONS:

1.) Use the **IRS Data Retrieval Tool (DRT)** within the FAFSA to transfer tax information directly from the IRS.*

- OR -

2.) Request your 2019 **IRS Tax Return Transcript** from the IRS and submit a copy to the Financial Aid Office.

**Married Students - Available only if you filed a Married Joint tax return, otherwise you must use option 2 and request both return transcripts.*

If the Student and/or Spouse had to submit an AMENDED TAX RETURN in 2019, you must provide the official tax information on the AMENDED TAX RETURN: -> ONE OPTION:

1.) Request the 2019 **IRS Record of Account Transcript** from the IRS and submit a copy to the Financial Aid Office.*

**an amended tax return is when a taxpayer files their taxes (IRS form 1040) then finds an error and must refile their taxes using the 1040X or when the IRS finds an error and makes a correction to the tax return on behalf of the taxpayer.*

C. Tax Information - FAFSA requirements for Student/Spouse who DID NOT FILE Taxes

<p>Student and Spouse (if married) who did not work, did not have any income, and did not file must:</p> <ol style="list-style-type: none"> 1.) Request the 2019 Verification of Non-Filing Letter from the IRS and submit a copy to the Financial Aid Office.* <p><i>*Must provide a letter for the person(s) who did not file taxes. (Student, spouse, or both.)</i></p>
<p>Students and Spouse (if married) who earned money from work in 2019 and did not file a tax return must → THREE STEPS: Earned wages from work → THREE STEPS:</p> <ol style="list-style-type: none"> 1.) Request the 2019 Verification of Non-Filing Letter from the IRS and submit a copy to the Financial Aid Office. 2.) Provide copies of ALL W-2s or 1099's for 2019 (or provide the 2019 IRS Wage & Income Transcript from the IRS) 3.) On the Verification Worksheet, list names of all employers you had in 2019. <p><i>*Must provide a letter and ALL W-2s or 1099s for the person(s) who earned wages and did not file taxes. (Student, spouse, or both.)</i></p>

D. 2019 Income Exclusions and Untaxed Income - FAFSA requirements for Student/Spouse

<p>If you received untaxable income, you must submit documentation to show the exact amounts:</p>
<ul style="list-style-type: none"> • Child Support → 2021-2022 Verification - Child Support Paid/Received worksheet and 2019 Account Records from the County Child Support Enforcement Agency who handled the child support case(s)
<ul style="list-style-type: none"> • Tax Deferred Pensions → 2019 W-2's – Payments made to a retirement plan that are not taxed until withdrawn
<ul style="list-style-type: none"> • Non-educational VA Benefits → Statement from agency showing amounts received in 2019
<ul style="list-style-type: none"> • Combat Pay – 2019 W-2's
<ul style="list-style-type: none"> • Social Security/Disability/Workers Comp → Statement from Agency showing amounts received in 2019

	Resources
<p>IRS Tax Transcripts / Verification of Non-Filing / Wage and Income Transcript</p>	<p>The Tax Return Transcript, Record of Account Transcript, IRS Verification of Non-Filing Letter, and Wage and Income Transcript (for W-2s) can be requested:</p> <p style="text-align: center;">Online at https://www.irs.gov/individuals/get-transcript</p> <p style="text-align: center;">-or-</p> <p style="text-align: center;">In person (with your photo identification) at the local IRS Office: Lima IRS Field Office, 2nd floor, 401 W. North St., Lima, OH 45801</p>
<p>IRS Data Retrieval Tool (DRT)</p>	<p>Login to the FAFSA, select MAKE A FAFSA CORRECTION. Navigate to the student financial section. Upon being successful with transferring the tax information into the FAFSA, resign it with your FSA ID and SUBMIT.</p>
<p>STARS Online</p>	<p>Track your verification status, student schedule, billing statement, Financial Aid awards, Important Dates, and many other student records on your STARS Online account.</p> <p><i>Students will be contacted via their Rhodes State College email or US Mail if more information/ documentation is needed.</i></p>

Documents must be submitted **30 days** prior to start of classes. *Submitting documents less than 30 days before the start of classes decreases the College's ability to have your financial aid eligibility finalized for the start of class and may cause a late fee to be assessed, if an alternative payment is not in place with the Business Office.* Use the IMPORTANT DATES calendars to view important financial aid and registration dates.