

2018-2019 Verification (V5) Worksheet

Dependent Student

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parent(s) reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. DEPENDENT STUDENT'S INFORMATION

| | | | |
|--|----------------------|-------------------|----------------------------------|
| Student's Last Name | Student's First Name | Student's M.I. | Student's Social Security Number |
| Student's Street Address (include apt. no.) | | | Student's Date of Birth |
| City | State | Zip Code | Student's E-mail Address |
| Student's Home Phone Number / Student's Alternate or Cell Phone Number | | Student ID Number | |

B. DEPENDENT STUDENT'S FAMILY INFORMATION

Number of Household Members: List below the people in your parent(s)' household. Include:

- Yourself
- Your parent(s) (including a step-parent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2018 through June 30, 2019, or if the other children would be required to provide parental information if they were completing a FAFSA for 2018-2019. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2019.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half-time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2018 and June 30, 2019. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

| Full Name (all household members) | Age | Relationship | Name of College attending between 07/01/18-06/30/19 | Will be Enrolled at Least Half-Time |
|--------------------------------------|-----------|---------------|--|--|
| <i>Missy Jones (example)</i> | <i>18</i> | <i>Sister</i> | <i>Central University</i> | <i>Yes</i> |
| | | <i>Self</i> | <i>Cedar Crest College</i> | |
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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.

C. DEPENDENT STUDENT'S INCOME INFORMATION TO BE VERIFIED

1. TAX RETURN FILERS—**Important Note:** If the student filed, or will file, an amended 2016 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student, filed or will file a 2016 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student's FAFSA. In most cases, for electronic tax return filers, 2016 IRS income tax return information for the IRS Data Retrieval Tool is available within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS income tax return information is available for the IRS Data Retrieval Tool within 6-8 weeks after the 2016 paper IRS income tax return has been received by the IRS. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

- The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2016 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2016 IRS income information into the student's FAFSA once the student has filed a 2016 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2016 IRS tax return transcript**— a photocopy of the income tax return is NOT acceptable.

A **2016 IRS Tax Transcript** may be obtained through:

- Online Request – Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get a Tax Transcript by Mail". Click "Get Transcript by Mail". Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript".
- Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

- Check here if the student's IRS tax return transcript is attached to this worksheet.*
- Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.*

2. TAX RETURN NONFILERS—Complete this section if the student, will not file and is not required to file a 2016 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2016.
- The student was employed in 2016 and has listed below the names of all the student's employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is attached. Attach copies of all 2016 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top. NOTE: We may require you to provide documentation from the IRS that indicates a 2016 IRS income tax return was not filed with the IRS.*

| Employer's Name | 2016 Amount Earned | IRS W-2 Attached? |
|--|--------------------|-------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00</i> | <i>Yes</i> |
| | | |
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D. PARENT'S INCOME INFORMATION TO BE VERIFIED

Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—**Important Note:** If the student's parent(s), filed or will file, an amended 2016 IRS tax return the student's financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if the student's parent(s) filed or will file a 2016 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student's FAFSA. In most cases, for electronic tax return filers, 2016 IRS income tax return information for the IRS Data Retrieval Tool is available within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS income tax return information is available for the IRS Data Retrieval Tool within 6-8 weeks after the 2016 paper IRS income tax return has been received by the IRS. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

- The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2016 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2016 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*
- The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2016 IRS tax return transcript(s)** - a photocopy of the income tax return is NOT acceptable.

A **2016 IRS Tax Transcript** may be obtained through:

- Online Request – Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get a Tax Transcript by Mail". Click "Get Transcript by Mail". Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript".
- Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

- Check here if an IRS tax return transcript(s) is attached to this worksheet.
- Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and is not required to file a 2016 income tax return with the IRS.

Check the box that applies:

- The parent(s) was not employed and had no income earned from work in 2016.
- The parent(s) was employed in 2016 and has listed below the names of all the parent's employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is attached. Attach copies of all 2016 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top. NOTE: We may require you to provide documentation from the IRS that indicates a 2016 IRS income tax return was not filed with the IRS.*

| Employer's Name | 2016 Amount Earned | IRS W-2 Attached? |
|---------------------------------|--------------------|-------------------|
| Suzy's Auto Body Shop (example) | \$2,000.00 | Yes |
| | | |
| | | |
| | | |

Student's Name: _____ SSN: _____

E. DEPENDENT STUDENT'S HIGH SCHOOL COMPLETION STATUS

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2018-2019:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate or GED transcript.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- 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.
- If state law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If state law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (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 documents the successful completion of a secondary school education in a homeschool setting.

If the student is unable to obtain the documentation listed above, he or she must contact the financial aid office.

F. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (To Be Signed At The Institution)

The student must appear in person at _____ to verify his or her
(Name of Postsecondary Educational Institution)
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 this
(Print Student's Name)
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 2018-2019.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Student's ID Number)

(Date)

Student's Name: _____ SSN: _____

G. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (To Be Signed With Notary)

If the student is unable to appear in person at _____ to
(Name of Postsecondary Educational Institution)
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 this
(Print Student's Name)
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 2018-2019.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Student's ID Number)

(Date)

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)

H. CERTIFICATION AND SIGNATURES

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

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

Student's Signature

Date

Parent's Signature

Date

*Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.
You should make a copy of this worksheet for your records.*