

# 2016-2017 Independent Verification Worksheet (V1)

Your 2016–2017 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called **Verification**. The school will compare information from your FAFSA with 2015 Federal IRS Tax data, this form, and any other requested documents. If there are any differences between your FAFSA information and your documents Tusculum College may make or ask you to make corrections. If the corrections lead to changes in your aid eligibility a revised award letter will be sent. Any corrections made will generate an updated Student Aid Report (SAR).

You must complete, sign and submit this worksheet along with any required documents to the Tusculum College Office of Financial Aid. After reviewing your file you may be asked for additional information. The law says that we have the right to ask you for this information before disbursing Federal Student Aid.

**SUBMISSION DEADLINE: June 1, 2016** *Verification paperwork received after this deadline may cause a delay in the processing of funds to your student account and cause a hold on your registration.*

If you have questions about this process, please contact the Office of Financial Aid as soon as possible to prevent delays.

## A. Independent 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.)			_____ School Assigned ID Number (if known)
_____ City	_____ State	_____ Zip Code	_____ Student's Date of Birth
_____ Student's Email Address			_____ Student's Home or Cell Phone Number

## B. Independent Student's Family Information

List the people in your household, include:

- Yourself,
- Your spouse, if your current marital status is married (not separated).
- Your children and / or step-children, even if they do not live with you, **if**:
  - a) You will provide more than half of their support through June 30, 2017 **or**,
  - b) The children would be required to provide your information when applying for Federal Student Aid.
- Other people if they now live with you and you **provide more than half of their support** and will continue to provide more than half of their support through June 30, 2017 (exclude foster children).

Write the names of all household members in the spaces below. Also, write in the name of the college for any household member 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, 2016, and June 30, 2017. *If more space is needed, please attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Date of Birth	Relationship	College (Will be Enrolled at Least Half Time)
		<i>Self</i>	Tusculum College

**Verification of 2015 Income Information for Individuals with Unusual Circumstances**

**Individuals Granted a Filing Extension by the IRS**

An individual, who is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2015;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2015; *and*
- A copy of IRS Form W-2 for each source of employment income received for tax year 2015 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2015.

**Individuals Who Filed an Amended IRS Income Tax Return**

An individual who filed an amended IRS income tax return for tax year 2015 must provide:

- A **2015 IRS Tax Return Transcript** or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *and*
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

**Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *and*
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

**Individuals Who Filed Non-IRS Income Tax Returns**

An individual who filed or will file a 2015 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2015; **or**
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2015 income tax return(s).

**C. Verification of 2015 IRS Income Tax Return Information (Student and Spouse –if Married)**

**Acceptable documentation: 2015 FAFSA IRS Data Retrieval (IRS DRT) or 2015 Federal Tax Return Transcript. Signed copies of tax forms are not acceptable documentation.**

2015 IRS Data Retrieval (IRS DRT) through the FAFSA on the web. This is the best way to verify income.

- 1) Go to [FAFSA.gov](http://FAFSA.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections,"
- 2) Navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student and/ or spouse is eligible to use the IRS DRT.
- 3). To obtain an IRS tax return transcript:
  - Online Request- Go to [www.IRS.gov](http://www.IRS.gov), under the Tools heading on the IRS webpage, 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. Make sure to request the "IRS Tax Return Transcript."
  - Paper Request Form-IRS Form 4506T-EZI or IRS Form 4506-T

It takes 2-3 weeks for a 2015 IRS Tax Transcript to be available for electronic IRS tax return filers, and 8-11 weeks for paper IRS tax return filers. It can take up to 10 business days to receive an IRS Tax Return Transcript.

**1. TAX RETURN FILERS—If the student or spouse (if married) filed or will file a 2015 IRS tax return, please complete this section.**

**Check the box that applies – Student, Spouse (if married) or Both:**

- Student  Spouse The student and/or spouse **has used the IRS DRT** in FAFSA on the Web to transfer 2015 IRS income tax return information to the FAFSA.
- Student  Spouse The student and/or spouse **has not yet used the IRS DRT** in FAFSA on the Web, but will use the tool to transfer 2015 IRS income tax return information to the FAFSA once the 2015 IRS income tax return has been filed.
- Student  Spouse The student and/or spouse is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the school with a **2015 IRS Federal Tax Return Transcript**—not a copy of the income tax return.
- Student  Spouse The IRS tax return transcript is attached to this worksheet.
- Student  Spouse The IRS tax return transcript will be submitted on \_\_\_\_\_.  
(Estimated date)

**2. Verification of Income Earned and Other Untaxed Income for 2015 :**

Provide copies of all 2015 IRS W-2 forms received for the student and/or spouse. The W-2 is used to determine the correct amount of income earned from work and the untaxed income shown in the boxes 12a through 12d.

- Student  Spouse The IRS W-2's are attached to this worksheet.
- Student  Spouse The IRS W-2's will be submitted on \_\_\_\_\_.  
(Estimated date)

Student's Name: \_\_\_\_\_ SSN: \_\_\_\_\_

3. **IF YOU OR YOUR SPOUSE WILL NOT FILE AND ARE NOT REQUIRED TO FILE** — Complete this section if the student and /or spouse (if married) will not file and are not required to file a 2015 income tax return with the IRS. Financial Aid is required by the Dept. of Education to review all income whether a tax return is completed or not. W-2's are needed to verify income correctly.

**Section A: Check the box that applies – Student, Spouse or Both:**

- Student  Spouse Were not employed and had no income earned from work in 2015.  
 Student  Spouse Were employed in 2015 (did not and are not required to file a tax return).

**Section B:** If you will not file and are not required to file a tax return, list below the names of all the student's and/or spouse's employers and the amount earned from each employer in 2015. **Please attach copies of all 2015 W-2 forms issued by employers. List every employer even if they did not issue a W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.**

Student Name or Parent's Name	Employer's Name	2015 Amount Earned	IRS W-2 Provided?
	<i>Total Amount of Income Earned</i>	\$	

**D. Verification of Child Support Paid in 2015**

Complete this section if the student and/or spouse **paid** child support in 2015.

Please indicate below the name of the person who paid the child support, to whom the child support was paid, the names of the children for whom child support was paid, and the total **annual** amount of child support paid in 2015 per child. If you need more space, attach a separate page that includes the student's name and Social Security Number at the top.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	AGE	Amount of Child Support Paid in 2015
		Total Amount of Child Support Paid		\$

**E. SNAP (Supplemental Nutrition Assistance Program - formerly known as food stamps) Benefits Confirmation**

- One of the persons listed in Section B of this worksheet received SNAP benefits in 2014 or 2015  
 No SNAP benefits were received in 2014 or 2015 by any one listed in Section B

**F. 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 whose information was reported on the FAFSA must sign and date.

\_\_\_\_\_  
 Student's Signature Date  
 \_\_\_\_\_  
 Spouse's Signature (Optional) Date

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

**Submit this worksheet to the Tusculum College Office of Financial Aid. You should make a copy of this worksheet for your records.**  
 Note: If we have reason to believe that any information on this form is inaccurate we may require supplemental documentation.