

# 2017-2018 Dependent Verification Worksheet (V1)

Your 2017–2018 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 your 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 and at least one parent 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, 2017** *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. 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.)			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. Dependent Student's Family Information

**A dependent student's legal parents, regardless of marital status or gender, are required to provide information on the FAFSA if they live together.** List the people in your parent(s)' household, include:

- Yourself.
- Your biological or adoptive parent(s) (including step-parent) regardless of marital status if they live together in the same household, even if you do not live with your parents. In the case of divorce, include the parent from which more of your financial support was provided (even if you do not live with them)
- Your parent(s)' other children, even if they do not live with your parent(s), **if:**
  - a) Your parents will provide more than half of their support through June 30, 2018 **or,**
  - b) The children would be required to provide parental information when applying for Federal Student Aid.
- Other people if they now live with your parent(s) and your parent(s) will **provide more than half of their support** and will continue to provide more than half of their support through June 30, 2018 (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 is or will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2017, and June 30, 2018. *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

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

**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).

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

C. **Verification of IRS Income Tax Return Information (Parent and Student)**

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

IRS Data Retrieval (IRS DRT) through the FAFSA on the web. **\*\*\*PLEASE ORDER A 2015 TAX TRANSCRIPT\*\*\***

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 parent is eligible to use the IRS DRT. If the parents filed separate tax returns, the IRS DRT cannot be used and the IRS Tax Return Transcript must be provided for each.
3. To obtain an IRS tax return transcript:
  - Get Transcript Online tool, which is available at [www.irs.gov](http://www.irs.gov) under the "Tools" tab by clicking "Get a tax transcript" and then "Get Transcript Online." The Get Transcript Online tool allows the user to immediately receive an online PDF version of their IRS Tax Return Transcript. The Get Transcript Online tool uses a new enhanced two-step, multi-factor authentication process that requires the user to register before submitting a transcript request.
  - To use the new 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). *Note that the IRS Get Transcript Online registration process will not result in any charges to the card or to the financial account.*
  - During the new Get Transcript Online registration process, the IRS will send the user a confirmation code via email and an authentication code via text. The IRS email and text will contain a one-time code that the user will use to finalize the Get Transcript Online registration. Note that the IRS will never request log-in information or personal data via email or text.
  - A tax filer who is not able to successfully register for the Get Transcript Online will be able to request a tax return transcript using one of the other methods discussed below.

Requesting Tax Transcripts by Mail, Paper, or Phone. **\*\*\*PLEASE ORDER A 2015 TAX TRANSCRIPT\*\*\***

1. A tax filer may also obtain a tax return transcript by electronically submitting a transcript request using the IRS Get Transcript by Mail option at <https://www.irs.gov>, by submitting a paper Form 4506T-EZ or 4506-T, or by calling 1-800-908-9946. These request methods will result in the IRS mailing a paper transcript to the address on file with the IRS. Unless the tax filer has formally changed their address with the IRS (through the IRS change of address processes), the address on file with the IRS is the one used on the individual's last filed tax return.
2. **IMPORTANT:** The IRS does not accept requests for transcripts at its Taxpayer Assistance Centers.
3. 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.

D. **TAX RETURN FILERS**—if the student or parent filed or will file a 2015 IRS tax return, please complete this section. If parents are married tax information is required for both parents-this includes step-parent.

**Check the box that applies – Student, Parent or Both:**

- Student  Parent the student and/or parent **has used** the IRS DRT in FAFSA on the Web to transfer 2015 IRS income tax return information to the FAFSA.
- Student  Parent the student and/or parent **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 filled.
- Student  Parent the student and/or parent 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.

