

2016-2017 Independent- Aggregate Verification Worksheet

Your 2016-2017 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/or your spouse reported on the 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 any differences, your FAFSA information may need to be corrected. Please see signatures requirements at the end of the form, attach any required documents and submit to your financial aid administrator at your school. If you have any questions, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

INSTRUCTIONS: Complete all sections of this form, sign and return to Mitchell College.

Section 1: STUDENT'S INFORMATION:

Last Name	First Name	M.I.	Social Security Number
Address			Date of Birth
City	State	Zip Code	Student's Cell Phone Number (include area code)
Student's Home Phone Number (Include area code)			Student's E-mail Address

Section 2: HOUSEHOLD MEMBERS ARE THE PEOPLE IN THE STUDENT'S HOUSEHOLD. Include:

- The student
- The student's spouse, if the student is married.
- The student's or spouse's children, if any, if the student or spouse will provide more than half of the children's support from July 1, 2016, through June 30, 2017, even if they don't live with the student.
- Other people if they **NOW** live with the student **AND** the student or spouse provides more than half of the other people's support and will continue to provide more than half of their support through June 30, 2017.

INSTRUCTIONS: Write the names, ages and relationships of all household members in spaces below. Also, include 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, attach a separate piece of paper with the student's name at the top.

FULL NAME	AGE	RELATIONSHIP	COLLEGE, UNIVERSITY OR CERTIFICATE PROGRAM	WILL BE ENROLLED AT LEAST HALF TIME
Missy Jones (example)	20(example)	Sister(example)	Central University(example)	Yes(example)
		Self		

Section 3: INCOME TO BE VERIFIED:

1. Did you or your spouse amend your 2015 Federal Tax Return(s) OR file an IRS extension OR were a victim of an IRS identity theft OR filed or will file a 2015 Income tax return with a taxing authority of a U.S. territory, commonwealth or with a foreign central government?

INSTRUCTIONS:

- If No, skip this page and go to page 3- “2. TAX RETURN FILERS”.
- If Yes, check the appropriate box and provide the required documentation for your circumstances.

☐ **If you and/or your spouse Amended your 2015 Federal Tax Return-** *Please submit both, a 2015 Tax Return Transcript (see page 3 for instructions on how to order) and a signed copy of 2015 IRS form 1040X “Amended US Individual Income Tax Return” that were filed with the IRS and skip page 3.*

Student _____ and Spouse _____ (if applicable)

☐ **If you and/or your spouse were Granted a Filing Extension by the IRS-** *Please submit a copy of IRS Form 4868 that was filed with the IRS for tax year 2015 and copies of all 2015 W-2s and, if self-employed, a signed statement certifying the amount of your Adjusted Gross Income (AGI) and U.S. Income tax paid for 2015. Once you have filed a federal tax return, please use the DRT on the FAFSA or submit a copy of your tax return transcript but for now you can skip page 3.*

Student _____ and Spouse _____ (if applicable)

☐ **If you and/or your spouse were Victims of IRS Tax-Related Identity theft-** *Provide a Tax Return Database View (TRDBV) transcript and a statement signed & dated by tax filer indicating he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft and skip page 3. To order a TRDBV call the IRS at 1-800-908-4490.*

Student _____ and Spouse _____ (if applicable)

☐ **If you and/or your spouse filed or will file a 2015 income tax return with a taxing authority of a U.S. territory, commonwealth or with a foreign central government-** *Please submit a transcript, obtained at no cost from the relevant taxing authority of a I.S. Territory (Guam, American Samoa, US Virgin Islands) or commonwealth (Puerto Rico & Northern Mariana Islands) or a foreign central government, that includes all of the tax filer’s income & tax information. If the transcript cannot be obtained at no cost, submit a signed copy of that 2015 Income tax return and skip page 3.*

Student _____ and Spouse _____ (if applicable)

➤ ***If you did not file a tax return, skip page 3 and go to page 4- “3. NON-TAX FILERS”***

Student's Name _____

2. TAX RETURN FILERS (Student or Spouse listed in the household that filed or will file a federal tax return)- *Complete this section:*

INSTRUCTIONS: *All IRS tax filers must either provide a 2015 Tax Return Transcript from the IRS, free of charge OR use the IRS DRT (Data Retrieval Tool) on the FAFSA. The best way to verify income is by using the IRS DRT that is part of the FAFSA. In most cases, no further documentation is needed to verify the 2015 IRS Income tax return information that was transferred into the student's FAFSA using the IRS DRT, if that information is not changed.*

How to order an IRS Tax Return Transcript:

- Go to www.irs.gov
- Under the "Tools" heading click on "Get a Tax Transcript".
- Click on "Get Transcript by MAIL".
- Type of Transcript, select "Return Transcript" for 2015. (DO NOT Request the "Account Transcript")
- Or call (800)908-9946 to order.

OR

How to use the IRS DRT on the FAFSA:

- **After** you have filed your Federal Tax Return
- Go to www.fafsa.gov and click on "Login"
- Enter your FSA ID Username & Password and click "Next"
- Click "Make FAFSA Corrections"
- Navigate to the financial information section for the Student on the FAFSA, select "Already Completed" for tax return filing status and answer the eligibility questions
- If eligible click "LINK TO IRS" and follow additional steps. If you make corrections to the information linked from the IRS, you will be asked by the school to provide a copy of your tax return transcript.
If you are not eligible, see instructions above to order a Tax return transcript

The following individuals cannot and should not try using the IRS DRT for 2016-2017:

- ✓ Anyone who is married and filed Head of Household
- ✓ Anyone who has a federal filing status of Married Filing Separately
- ✓ Anyone that has filed an Amended 1040X federal tax return
- ✓ Anyone that has filed a Puerto Rican or foreign tax return
- ✓ Anyone with a FAFSA marital status date of January 1, 2016 or later
- ✓ Victims of IRS Tax-Related Identity Theft

Note: In most cases, for electronic filers, 2015 IRS income tax information is available for the IRS DRT or IRS Tax Return Transcript within 2-3 weeks after the IRS accepts the electronic submission of your tax return. Generally, for paper filers, 2015 IRS income tax information is available for the IRS DRT or IRS Tax Return Transcript within 6-8 weeks after it is received by the IRS. The school cannot complete the verification process until the IRS tax return information has been transferred into the FAFSA (IRS DRT) or we receive a paper tax return transcript.

3. NON-TAX FILERS (Student or Spouse listed in the household that did not and won't file a federal tax return) *Complete this section:*

A. Please check below those individuals who were not employed and had no income earned from work in 2015:

Student _____ Spouse _____ (if applicable)

B. Please check below those individuals who were employed in 2015 and did not file and are not required to file a 2015 federal tax return and complete chart below.

Student _____ Spouse _____ (if applicable)

INSTRUCTIONS FOR NON-TAX FILERS WHO WERE EMPLOYED: *List below the employer(s), the amount earned from each employer in 2015 and attach a copy of the 2015 W-2s. If the W-2 is not attached, you must state the reason it is not attached. List every employer even if the employer did not issue a W-2 form. If more space is needed, attach a separate piece of paper.*

NAME OF STUDENT OR SPOUSE	EMPLOYER'S NAME	2015 AMOUNT EARNED	W-2 ATTACHED? If No, give reason
Missy Jones (example)	Jim's Auto shop (example)	\$2,100 (example)	Yes (example)

Note: We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.

**** Please continue to complete Section 4****

Student's Name _____

Section 4: HIGH SCHOOL COMPLETION STATUS:

INSTRUCTIONS: Provide one of the following documents that indicate the student's high school completion status when the student begins college in 2016-2017:

- A copy of the student's high school diploma.
- A copy of the student's final high school transcript that shows the date when the diploma was awarded.
- A copy of the student's state certificate or transcript received after the student passed a State-authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma.
- For students who completed postsecondary 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.
- 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 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 homeschooled setting.

Section 5: CERTIFICATION AND SIGNATURES:

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

Each person signing below certifies that all the information reported is complete and correct.

Student's Signature (Required)

Date

Spouse's Signature (optional)

Date

**** Please continue to complete Section 6 or Section 7 ****

INSTRUCTIONS:

- ***The student must appear in person at Mitchell College to complete section 6.***
 - ***If the student cannot appear in person at Mitchell College at the time of this request, SKIP Section 6 and complete Section 7 before a Notary.***
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Section 6: IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE- (to be signed at Mitchell College)

A. The student must appear in person at Mitchell College to verify his or her identity

by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport.

Mitchell College will maintain a copy of the student's photo ID that is annotated with the date it was received and reviewed and the name of the official at Mitchell College authorized to collect the student's ID.

Mitchell College Official (Print Name)

Date

B. In addition, the student must sign, in the presence of the Mitchell College official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this *Statement of*
(Print Student's Name)

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 Mitchell College for 2016-2017.

Student's Signature

Date

Section 7: IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE- (to be signed with a Notary)

A. If the student is unable to appear in person at Mitchell College to verify his or her identity, the student must provide to Mitchell College:

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

Statement of Educational Purpose

B. In addition, the student must sign, in the presence of a Notary the following:

I certify that I _____ am the individual signing this *Statement*

(Print Student's Name)

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 Mitchell College for 2016-2017.

Student's Signature

Date

Notary's Certificate of Acknowledgement

State of _____ City/County of _____

On _____ before me _____
(Date) (Notary's Name)

personally appeared, _____, and proved to me on basis of
(Printed name of the signer)

satisfactory evidence of identification _____ to be the above-
(Type of government-issued photo ID provided)

named person who signed the foregoing instrument.

WITNESS my hand and official seal _____
(Seal) (Notary Signature)

My commission expires on _____
(Date)