

2016-2017 Independent – Household Resources 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.

Section 4: OTHER UNTAXED INCOME:

INSTRUCTIONS FOR SECTION 4 "OTHER UNTAXED INCOME":

- 1) Answer each question below as it applies to the **student and the student's spouse** whose information is on the FAFSA.
- 2) Provide copies of **all W-2s** issued to student and spouse.
- 3) **If any item does not apply, enter "N/A"** for Not Applicable where a response is requested **or** enter 0 in an area where an amount is requested. **Complete ALL sections.**
- 4) To determine the correct annual amount for each item: If you paid or received the same amount every month in 2015, multiply that amount by the number of months in 2015 you paid or received it. If you did not pay or receive the same amount each month in 2015, add together the amounts you paid or received each month.
- 4) If more space is needed, provide a separate page with the student's name at the top of the page.

Student's Name _____

1. PAYMENTS TO TAX-DEFERRED PENSION AND RETIREMENT SAVINGS:

INSTRUCTIONS: List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans such as 401(K) or 403(b), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D,E,F,G,H and S. Attach all 2015 IRS W-2s issued by employers.

Name of Person Who Made the Payment:	Annual Amount Paid in 2015
Total Payments to Tax-deferred Pension & Retirement Savings	\$

2. CHILD SUPPORT RECEIVED:

INSTRUCTIONS: List the actual amount of any child support received in 2015 for the children in your household. **DO NOT INCLUDE** foster care payments, adoption payments or any amount that was court-ordered but not actually paid.

Name of Adult who Received the Child Support	Name of Child for Whom Child Support was Received	Annual Amount of Child Support Received in 2015
Total Amount of Child Support Received		\$

3. HOUSING, FOOD AND OTHER LIVING ALLOWANCES PAID TO MEMBERS OF THE MILITARY, CLERGY AND OTHERS:

INSTRUCTIONS: Include cash payments and /or the cash value of benefits received.

DO NOT INCLUDE the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Annual Amount of Benefit Received in 2015
Total Amount of Benefits Received		\$

4. VETERANS NON-EDUCATION BENEFITS:

INSTRUCTIONS: List the total amount of veterans' non-education benefits received in 2015. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC) and/or VA Educational Work Study allowances.

DO NOT INCLUDE federal veteran's educational benefits such as: Post 9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits.

Name of Recipient	Type of Veterans Non-Education Benefit	Annual Amount of Benefit Received in 2015
Total Amount of Benefits Received		\$

5. ADDITIONAL OTHER UNTAXED INCOME:

INSTRUCTIONS: List the amount of other untaxed income not reported and not included elsewhere on this form. Include untaxed income such as Workers' Compensation, Disability benefits, Black Lung Benefits, Untaxed portions of health savings accounts from IRS Form Line 25, Railroad Retirement Benefits, etc.

DO NOT INCLUDE any items reported in section 4 (1-4) above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), Untaxed Social Security benefits, Supplemental Security Income (SSI), extended foster care payments, Workforce Investment Opportunity Act (WIOA) educational benefits, combat pay, on-base military housing or military housing allowance, benefits from flexible spending arrangements (ex. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Annual Amount of Other Untaxed Income Received for 2015
Total Amount of Other Untaxed Income		\$

6. MONEY RECEIVED OR PAID ON THE STUDENT'S BEHALF IN 2015:

INSTRUCTIONS: List any money received or paid on the student's behalf (ex. Payment of student's bills) and not reported elsewhere on this form. ENTER THE TOTAL AMOUNT OF CASH SUPPORT THE STUDENT RECEIVED IN 2015.

For example, if someone is paying rent, utility bills, etc. for the student or gives cash, gift cards, etc., include the amount of that person's contribution unless the person is the student's spouse whose information is reported on the student's 2016-2017 FAFSA.

INCLUDE: Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student, such as grandparents, aunts, uncles and non-custodial parents.

DO NOT INCLUDE support from a spouse whose information was reported on the 2016-2017 FAFSA.

The Purpose: ex. Cash, Rent, Books etc.	Source: Who provided the funds	Annual Amount Received in 2015
Total Amount Received		\$

Student Name: _____

7. ADDITIONAL INFORMATION:

Instructions: Please provide information about any other resources, benefits and other amounts received by the student and any members of the student's household.

This may include items that were not required to be reported on the FAFSA or other forms submitted to the financial aid office. Include such things as untaxed social security, federal veterans' education benefits, military housing, SNAP, TANF, etc.

Name of Recipient	Type of Financial Support	Annual Amount of Financial Support Received for 2015
Total Amount of Financial Support Received		\$

Comments:

Section 5: CERTIFICATION AND SIGNATURES:

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison 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