

# 2017-2018 Independent- Aggregate Verification Worksheet

Your 2017-2018 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, 2017, through June 30, 2018, 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, 2018.

**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, 2017 and June 30, 2018. If more space is needed, attach a separate piece of paper with the student's name at the top.

FULL NAME	AGE	RELATIONSHIP	COLLEGE	WILL BE ENROLLED AT LEAST HALF TIME
Missy Jones (example)	20(example)	Son (example)	Central University(example)	Yes(example)
		Self		

### Section 3: INCOME TO BE VERIFIED:

**1. Did you or your spouse amend (change) 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 Non-IRS Income tax return?**

#### ***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 circumstance.

☐ **If you and/or your spouse Amended (changed) your 2015 Federal Tax Return-** *Please submit the following: 1) a 2015 Tax Return Transcript (see page 3 for instructions) 2) a signed copy of 2015 IRS form 1040X “Amended US Individual Income Tax Return” that were filed with the IRS. Skip page 3.*

Student \_\_\_\_\_ and Spouse \_\_\_\_\_ (if applicable)

☐ **If you and/or your spouse were Granted a Filing Extension by the IRS and have not filed a 2015 tax return upon receiving this form-** *Please submit the following: 1) Verification of non-filing letter from the IRS dated on or after October 1, 2016 (To order, complete 4506-T, check box 7 and mail to the appropriate IRS office) 2) a copy of IRS Form 4868 that was filed with the IRS for tax year 2015 3) a copy of the IRS’s approval of an extension beyond the automatic 6-month extension 4) copies of all 2015 W-2s 5) 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-** *Submit the following: 1) Tax Return Database View (TRDBV) transcript (To order call 1-800-908-4490) 2) 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. Skip page 3*

Student \_\_\_\_\_ and Spouse \_\_\_\_\_ (if applicable)

☐ **If you and/or your spouse filed or will file a Non-IRS income tax return for 2015-** *A. Guam, Commonwealth (Puerto Rico or Northern Mariana Islands) or U.S. Virgin Islands; please submit a signed copy of your 2015 Income Tax Return that was filed. **OR** B. American Samoa; please submit a copy of your 2015 tax account information. **OR** C. Foreign Tax Authority not mentioned above; please submit a signed copy of your 2015 Income Tax Return that was filed. If you are charged a fee, please provide documentation of charge as well. Skip page 3.*

Student \_\_\_\_\_ and Spouse \_\_\_\_\_ (if applicable)

Student's Name \_\_\_\_\_

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

## **2. TAX RETURN FILERS (Student or Spouse listed in the household that filed 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. Note: 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.

### **A 2015 IRS Tax Return Transcript may be obtained through:**

- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript ONLINE – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

**OR**

### **How to use the IRS DRT on the FAFSA:**

- Go to [www.fafsa.gov](http://www.fafsa.gov) and click "Login"
- Enter your FSA ID (Username & Password) and click "NEXT"
- Click "Make FAFSA Corrections"
- Navigate to the financial information sections for Student and/or Parent on the FAFSA, select "Already Completed" for tax return filing status and answer eligibility questions
- If eligible click "LINK TO IRS" and follow additional steps. If you make changes 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 to use the IRS DRT, see instructions above to order a Tax return transcript*

**The following individuals cannot and should not try using the IRS DRT for 2017-2018:**

- ✓ 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

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

**Instructions:**

- 1) Complete this section **and**
- 2) Submit documentation from the IRS, dated after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS (To order a "Verification of Non-Filing", complete 4506-T form, check Box 7 and mail to the appropriate IRS office)

**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	ANNUAL AMOUNT EARNED IN 2015	W-2 ATTACHED? If No, give reason
Missy Jones (example)	Jim's Auto shop (example)	\$2,100 (example)	Yes (example)

**\*\* 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 2017-2018:

- 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.
- A student who is unable to obtain the documentation listed above must contact the financial aid office.

## 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.

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Mitchell College Official (Print Name)

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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 2017-2018.

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Student's Signature

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Date

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Student ID

**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** 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 2017-2018.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student ID

**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)