

2017-2018 Independent - Standard 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 person'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 IRS 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 your 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 form, 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 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 the IRS at 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, 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, 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 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 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, 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)

Section 4: 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