



VERIFICATION WORKSHEET DEPENDENT (V1) 2017-2018

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 your parents reported on your 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 differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

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.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

B. Dependent Student's Family Information

1. List below the people in your parent(s)' household. Include:
 - The student.
 - The parents (including a stepparent) even if the student doesn't live with parents.
 - The parent(s)' other children if the parent(s) will provide more than half of the children's support from July 1, 2017, through June 30, 2018, or if the other children would be required to provide parental information if they were completing a FAFSA for 2017-2018. Include children who meet either of these standards, even if they do not live with your parent(s).
 - Other people, if they now live with the parent(s) and the parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.
2. Number in College: Include in the space below information about any household member who is or will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2017, and June 30, 2018. Include the name of the college.

If more space is needed, provide a separate page w/the student's name & SSN at the top.

Full Name	Age	Relationship	Name of College	Enrolled at Least Half Time in 17-18
<i>Marty Jones(example)</i>	28	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members in eligible postsecondary educational institutions is inaccurate.



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C. Dependent Student's Income Information to Be Verified

Please select one of the following categories and complete the corresponding information for that category.

1. The student filed a 2015 federal tax return. Complete Category 1 below.
2. The student did not file a 2015 federal tax return. Complete Category 2 below.
3. The student filed an amended 2015 federal tax return. Complete Category 3 below.
4. The student filed a non-IRS tax return (e.g., a tax return for a foreign country). Complete Category 4 below.
5. The student is a victim of IRS identity theft. Complete Category 5 below.
6. The student was granted a filing extension by the IRS. Complete Category 6 below.

1. Verification of 2015 IRS Income Tax Return Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2015 or had a change in marital status after the end of the 2015 tax year on December 31, 2015.

Instructions: Complete this section if the student and spouse filed or will file a 2015 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2015 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT within 6–8 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA.
- The student 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 into the student's FAFSA once the 2015 IRS income tax return has been filed.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript(s)**.

A 2015 IRS Tax Return Transcript may be obtained through the:

- **Online Request** - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- **IRS2Go App** –
Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- **Telephone Request** - 1-800-908-9946
- **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

If the student and spouse filed separate 2015 IRS income tax returns, **2015 IRS Tax Return Transcripts** must be provided for both.

- Check here if a **2015 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2015 IRS Tax Return Transcript(s)** will be provided later.



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Verification of 2015 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2015.
- The student and/or spouse were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	2015 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

You MUST provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS. This can be obtained with the same instructions as obtaining a IRS Tax Transcript noted in section C: 1.

2. Verification of 2015 IRS Income Tax Return Information for Students Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A signed copy of the original 2015 IRS income tax return that was filed with the IRS or a 2015 IRS Tax Return Transcript (signature not required) for the 2015 tax year; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS

3. Verification of 2015 Income Tax Return Information for Students Who Filed Non-IRS Income Tax Returns

An individual filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2015 income tax return(s).

4. Verification of 2015 IRS Income Tax Return Information for Students Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2015 IRS Tax Return Transcript or use the IRS DRT must provide a signed copy of the 2015 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- A statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or
- A copy of a police report if it was filed related to the IRS identify theft.



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5. Verification of 2015 IRS Income Tax Return Information for Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- 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.

D. Parent’s Income Information to Be Verified

Please select one of the following categories and complete the corresponding information for that category.

1. The parents filed a 2015 federal tax return. Complete Category 1 below.
2. The parents did not file a 2015 federal tax return. Complete Category 2 below.
3. The parents filed an amended 2015 federal tax return. Complete Category 3 below.
4. The parents filed a non-IRS tax return (e.g., a tax return for a foreign country). Complete Category 4 below.
5. The parents are a victim of IRS identity theft. Complete Category 5 below.
6. The parents were granted a filing extension by the IRS. Complete Category 6 below.

1. Verification of 2015 IRS Income Tax Return Information for Parent Tax Filers

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2015 or had a change in marital status after the end of the 2015 tax year on December 31, 2015.

Instructions: Complete this section if the parents filed or will file a 2015 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2015 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT within 8–11 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

Check the box that applies:

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student’s FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student’s FAFSA once the 2015 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a 2015 **IRS Tax Return Transcript(s)**.



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A 2015 IRS Tax Return Transcript may be obtained through the:

- **Online Request** - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- **IRS2Go App** -
Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- **Telephone Request** - 1-800-908-9946
- **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

If the parents filed separate 2015 IRS income tax returns, 2015 **IRS Tax Return Transcripts** must be provided for both.

- Check here if a 2015 **IRS Tax Return Transcript(s)** is provided.
- Check here if a 2015 **IRS Tax Return Transcript(s)** will be provided later.

2. Verification of 2015 IRS Income Tax Return Information for Parent Nontax Filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed and had no income earned from work in 2015.
- One or both parents were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	2015 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

You **MUST** provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS. This can be obtained with the same instructions as obtaining a IRS Tax Transcript noted in section C: 1.

3. Verification of 2015 IRS Income Tax Return Information for Parents Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A signed copy of the original 2015 IRS income tax return that was filed with the IRS or a 2015 IRS Tax Return Transcript for the 2015 ax year; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.



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4. Verification of 2015 IRS Income Tax Return Information for Parents Who Filed Non-IRS Income Tax Returns

An individual filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2015 income tax return(s).

5. Verification of 2015 IRS Income Tax Return Information for Parents Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2015 IRS Tax Return Transcript or use the IRS DRT must provide a signed copy of the 2015 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- A statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or
- A copy of a police report if it was filed related to the IRS identify theft.

6. Verification of 2015 IRS Income Tax Return Information for Parents Granted a Filing Extension by the IRS

If an individual is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- 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.

E. Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date this worksheet.

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

Student's Signature

Date

Parent's Signature

Date

*Submit this worksheet to the Metro Technology Centers Financial Aid Office
1900 Springlake Drive, Oklahoma City, OK, 73111*