



## VERIFICATION WORKSHEET DEPENDENT (V5) 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:
  - Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
  - Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2016, through June 30, 2017, or if the other children would be required to provide parental information if they were completing a FAFSA for 2016-2017. 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 your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2017.
  
2. Include the name of the college for any household member, **excluding your parent(s)**, who 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, 2016, and June 30, 2017. *If more space is needed, provide a separate page w/the student's name & SSN at the top.*

Full Name	Age	Relationship	College	Enrolled at Least Half Time in 16-17
<i>Marty Jones(example)</i>	<i>28</i>	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		



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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](http://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 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](http://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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### 2. 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.**

### 3. 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

### 4. 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).

### 5. 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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### 6. 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 is a victim of IRS identity theft. Complete Category 5 below.
6.  The parents was 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](http://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 parent has used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student’s FAFSA.
- The parent 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 parent 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)**.



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

- **Online Request** - Go to [www.irs.gov](http://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.

### 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.

### 2. 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 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.



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### 3. 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).

### 4. 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.

### 5. 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. Dependent Student's High School Completion Status to Be Verified

Provide one of the following documents to 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.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- 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.



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- 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 a 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 homeschool setting.
- 
1. I graduated from \_\_\_\_ High School located in \_\_\_\_:  
 Check here if a copy of your high school diploma or final official high school transcript, which includes your completion/graduation date, is attached to this worksheet.
  2. I successfully completed the General Education Diploma (GED) requirements:  
 Check here if a copy of your General Educational Development (GED) certificate, an official GED transcript that indicates you passed the exam, or a state authorized high school equivalent certificate, is attached to this worksheet.
  3. I was home-schooled by \_\_\_\_:  
 Check here if a transcript or the equivalent signed by your parent or guardian that lists the secondary school courses you completed and documents that you successfully completed secondary school education in a home school setting, is attached to this worksheet.
  4. I have successfully completed at least a two-year degree program that is acceptable for full credit towards a bachelor's degree:  
 Check here if an official copy of your academic transcript showing that you completed a least a two-year program acceptable for full credit towards a bachelor's degree is attached to his worksheet.
  5. I graduated from \_\_\_\_ High School located in \_\_\_\_, a foreign country:  
 Check here if a copy of your "secondary school leaving certificate" or other similar document, which includes your completion status date, is attached to this worksheet.

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



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### F. Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at Metro Technology Centers to verify his or her  
(Name of Postsecondary Educational Institution)

identity by presenting a unexpired valid, government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. **The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed and the name of the official at the institution authorized to collect the student's ID.**

In addition, **the student must sign, in the presence of the institutional official**, the following statement:

#### Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

Statement 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 Metro Technology Centers for 2017-2018.  
(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

### G. 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*