2017-2018 Independent Verification Worksheet

Office of Financial Aid

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Complete Steps 1-4: Write N/A if an item is not applicable to your situation.

STEP 1- STUDENT INFORMATION

______________________________________|______________________|____________
Last Name First Name M.I. Student Number Date of birth

(______)______________________________|_____________________________________
Phone number Email Address

STEP 2- NUMBER OF HOUSEHOLD MEMBERS AND NUMBER IN COLLEGE

List below the people in your household. Include:

- yourself, and your spouse if you are married, and
- your children, if you will provide more than half of their support from July 1, 2017 through June 30, 2018 (**even if they do not live with you**),
- other people if they now live with you, and you provide more than half of their support **and** will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.

Include the name of the college next to the member(s) of your household that will be enrolled between July 1, 2017 and June 30, 2018 at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution.

NUMBER IN HOUSEHOLD List Household Member's Full Name	**Age**	**Relationship to Student**	**Lives with you? (Yes or No)**	**NAME OF COLLEGE ATTENDING** *(if at least half time)*	**Enrolled at least half-time? (Yes or No)**
		Self (Student)		Savannah Technical College	

STEP 3- INCOME INFORMATION

Note: Federal regulations mandate that a signed copy of the tax return cannot be accepted. To request a Tax Return Transcript (if needed) please see the Verification Instruction Sheet.

STUDENT	**CHECK THE ONE THAT APPLIES**	**SPOUSE**
	Check here if you used the IRS Data Retrieval Tool and did not make corrections to the IRS data when you completed your FAFSA (IRS Tax Return Transcript not required).	
	Check here if you are attaching a copy of your 2015 IRS Tax Return Transcript.	
	Check here if you did not file or did not have any income for 2015 or if you are not being asked to submit tax documents. **Complete the Non-Tax Filer's Statement and Declaration of No/Low Income sections below and provide IRS Letter of Non-Filing****	
	Check here if you did not file **and are not required to file** a 2015 Federal Income Tax Return. ****You must include an IRS Letter of Non-Filing and complete Non-Tax Filer's Statement**	

STUDENT 2015 Amount Earned	** NON TAX FILER'S STATEMENT List Employer's Name/Other Sources of Income Must provide: • Copy of 2015 W-2's & 1099's OR IRS Wage & Income Statement AND • IRS Letter of Non Tax Filing **		SPOUSE 2015 Amount Earned
$			$
$			$
$			$
$			$
$			$
$			$

STUDENT	2015 DECLARATION OF NO/LOW INCOME • List ALL 2015 sources and amount of monies received or paid on your behalf (including, but not limited to: rent/utility/cell phone bills, cash/gift cards) that is not reported elsewhere on this form. This includes money that you received from a parent/family member. • IRS Letter of Non Tax Filing **		SPOUSE
	Check here if you did not work in 2015 and had no income because you were:		
	Incarcerated (attach release documents)	Incarcerated (attach release documents)	
	Lived with parents/relatives	Lived with parents/relatives	
	Lived with other party	Lived with other party	
	Other (provide written statement)	Other (provide written statement)	
Amount Received	**List sources of money received or paid on your behalf in 2015**		**Amount Received**
$			$
$			$
$			$

STUDENT 2015	SOURCE OF UNTAXED INCOME Include proof of untaxed income (W-2, 1099, statement of income/benefits)	SPOUSE 2015
$	Child Support Received in 2015	$
$	2015 Tax-deferred pension and retirement savings plans (paid directly or withheld from earnings, such as 401K and 403b plan). Amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Do not include amounts reported in code DD (employer contributions toward employee health benefits).	$
$	2015 IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	$
$	2015 Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	$
$	2015 Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	$
$	2015 Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	$
$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits) received in 2015. Don't include the value of on-base military housing or the value of a basic military allowance for housing.	$
$	2015 Veterans' non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	$

STEP 4 - REQUIRED SIGNATURES

Warning: if you purposely give false or misleading information on this worksheet you will not be eligible for financial aid and you may be fined, sentenced to jail or both.

By signing this worksheet, I certify that all the information reported to qualify for Federal Student Aid is complete and correct.

____ _________________

Student Signature (Spouse's signature not required) (No Electronic Signatures) Date

REV: 03/03/2017
CODE: VDWKSH

Financial Aid Office Use Only – Processed Date ____________
Document Processed By: ______________________________

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2017-2018 Verification Worksheet Instructions

Your 2017-2018 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. This is to ensure that your FAFSA was completed correctly. To verify that you provided correct information, submit the completed/signed 2017-2018 Verification Worksheet along with the required supporting documentation to the Financial Aid Office. Make sure the form is signed by you (the student). A financial aid administrator will compare your FAFSA with the verification information provided. If there are differences, your FAFSA information will be corrected by the Financial Aid Office.

The verification process can take up to 3 weeks to complete. If FAFSA corrections are required, please allow an additional 5-7 business days for the corrections to be processed. Federal financial aid **will not** be awarded until the verification process is completed. Check your BANNER Web and student e-mail frequently for updates on your financial aid status.

The IRS Data Retrieval Tool is recommended for all tax filers. Instructions for IRS Data Retrieval may be found at: http://www.uwyo.edu/sfa/fafsa/irs-data-retrieval.html. If you used the IRS Data Retrieval Tool and did not subsequently change data that was retrieved, you do not have to submit a copy of your 2015 Tax Return Transcript.

If you did not utilize the IRS Data Retrieval Tool when you filed the FAFSA, you may use the corrections functionality of FAFSA on the Web. Some applicants are not eligible to use the IRS Data Retrieval Tool**. If you cannot or did not utilize the IRS Data Retrieval Tool or if you used the IRS Data Retrieval Tool and made changes to the IRS data, a 2015 IRS Tax Return Transcript is required.** Tax transcripts must be sent directly to the student and/or parent or spouse. Any of the following methods can be utilized to order your tax transcript:

Requesting a 2015 IRS Tax Return Transcript or Letter of Non-Filing

A **2015 IRS Tax Return Transcript or Letter of Non-Filing** 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 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 OR Google Play at https://play.google.com/store/apps/details?id=gov.irs
- Telephone Request - 1-800-908-9946 (Allow 5-10 business days)
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

Filing a Tax Extension	If you, your spouse, or parent(s) have been granted a filing extension by the IRS, a copy of the IRS Form 4868, W-2 Forms, and if self-employed, a signed statement certifying the amount of the individual’s AGI and U.S Income taxes paid for tax year 2015 must be provided to the Financial Aid Office.
Amended Tax Return	If you, your spouse, or parent(s) 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 Tax Return” that was filed with the IRS.
Victim of Identity Theft	If you, your spouse, or parent(s) have been the victim of IRS identity theft and are unable to obtain a 2015 IRS Tax Return Transcript or use the IRS DRT, 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, must be provided. If the individual was not required to submit one, he or she may provide a statement signed and dated indicating that s/he is 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.

Please note: Federal regulations prevent us from accepting copies of Federal Tax Returns (1040/1040A/1040EZ) for verification purposes. The only exceptions to this is if you file an amended tax return or your tax return is from Puerto Rico or a converted foreign income tax return. There are no other exceptions.

GET TRANSCRIPT ONLINE

To print your online 2015 IRS Tax Return Transcript or Letter of Non-Filing from IRS website:

https://www.irs.gov/individuals/get-transcript

Here's what new users need to get started:

- A readily available email address;
- Your Social Security number;
- Your filing status and address from your last-filed tax return;
- Access to certain account numbers for either:
  - credit card, or
  - home mortgage loan, or
  - home equity (second mortgage) loan, or
  - home equity line of credit (HELOC), or
  - car loan
- A readily available mobile phone. Only U.S-based mobile phones may be used. Your name must be associated with the mobile phone account. Landlines, Skype, Google Voice or similar virtual phones as well as phones associated with pay-as-you-go plans cannot be used;
- If you have a "credit freeze" on your credit records through Equifax, it must be temporarily lifted before you can successfully complete this process.

Because this process involves verification using financial records, there may be a "soft notice" placed on your credit report. This notice does not affect your credit score.

To securely access Get Transcript Online, first-time users must:

- Submit their name and email address to receive a confirmation code;
- Enter the emailed confirmation code;
- Provide their SSN, date of birth, filing status and address on the last filed tax return;
- Provide some financial account information for verification such as the last eight digits of their credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan number;
- Enter a mobile phone number to receive a six-digit activation code via text message;
- Enter the activation code;
- Create username and password, create a site phrase and select a site image.

Returning taxpayers who have not completed the new secure access process:

- Log in with an existing username and password;
- Submit financial account information for verification, for example, the last eight digits of a credit card number or car loan number or home mortgage account number or home equity (second mortgage) loan account number;
- Submit a mobile phone number to receive an activation code via text;
- Enter the activation code.

Returning taxpayers who have completed the new secure access process:

- Log in with an existing username and password;
- Receive a security code text via mobile phone provided with account set up;
- Enter the security code into secure access.

If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you may use Get Transcript by Mail.

Get Transcript by Mail allows you to go online and select a tax return or account transcript type to be mailed to your address of record and delivered within 5 to 10 days. You may also call 1-800-908-9946 to order these transcripts by phone.