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## 2016-2017 Household Resources Verification Worksheet

### Step 1 – Student Information

<i>Last Name</i>	<i>First Name</i>	<i>Student ID Number or SSN</i>	<i>Date of Birth</i>
<i>Permanent Address</i>		<i>City/State/Zip</i>	
<i>Permanent Phone Number (include area code)</i>	<i>Cell Phone Number (include area code)</i>	<i>Email Address</i>	

### Step 2 – Family Information

If you are a **dependent student**, include:

- You, the student
- Your parent(s) (including step-parents) even if you do not live with parent(s)
- Your parent(s) other dependent children if your parent(s) will provide more than half of their support from July 1, 2016 through June 30, 2017, even if they do not claim them on their federal income tax return
- Other people only if they now live in your parent(s)' household and your parent(s) will provide more than half of their support from July 1, 2016 through June 30, 2017
- Indicate yes or no for anyone who is or will be enrolled in college at least half time (other than parents) between July 1, 2016 and June 30, 2017
- Indicate yes or no for anyone in the household that received SNAP benefits

If you are an **independent student**, include:

- You, the student
- Your spouse (if you are married)
- Your children if you will provide more than half of their support from July 1, 2016 through June 30, 2017, even if you do not claim them on your federal income tax return
- Other people only if they live in your household and you provide more than half of their support and will continue to do so from July 1, 2016 through June 30, 2017
- Indicate yes or no for anyone who is or will be enrolled in college at least half time between July 1, 2016 and June 30, 2017
- Indicate yes or no for anyone in the household that received SNAP benefits

Full Name	Age	Relationship	Name of College/University (If at least half-time 2016-2017)	Is or will be enrolled at least ½ time	Received SNAP Benefits (Yes/No)
		<i>Self</i>	<i>University of Saint Francis</i>		

*Please attach an additional page if necessary.*

#### Step 4 – Student and/or Spouse (if married) Tax Return Transcript & Income Information

Check the box that applies:

- The student used the IRS Data Retrieval Tool (DRT) when completing the FAFSA on the Web to transfer 2015 federal income tax return information into the student’s FAFSA (preferred method by the U.S. Department of Education)
- The student did not use the IRS DRT when completing the FAFSA, but will use the tool to transfer 2015 federal 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 University of Saint Francis a 2015 IRS Income Tax Return Transcript
  - A 2015 Federal Income Tax Return Transcript can be obtained one of the following ways:
    - Online at [www.irs.gov](http://www.irs.gov)
    - Telephone request at 1-800-908-9946 (long wait times should be expected)
    - Paper request form – IRS Form 4506T-EZ or IRS Form 4506-T
    - IRS2Go App – Apple online store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
    - IRS2Go App – Google Play at <https://play.google.com/store/apps/details?id=gov.irs&hl=en>
- The student was not employed in 2015 and there was zero income from work in 2015
- The student was employed in 2015 and has listed all employers in the table below, and has attached a 2015 W-2 or 1099 for each employer

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2015	W-2 Attached? (Yes or No)
<b>TOTAL</b>		

#### Step 5 –Parent Tax Return Transcript(s) & Income Information (Dependent Student Only)

Check the box that applies:

- The parent(s) used the IRS Data Retrieval Tool (DRT) when completing the FAFSA on the Web to transfer 2015 federal income tax return information into the student’s FAFSA (preferred method by the U.S. Department of Education)
- The parent(s) did not use the IRS DRT when completing the FAFSA on the Web, but will use the tool to transfer 2015 federal income tax return information into the student’s FAFSA once the 2015 IRS income tax return has been filed
- The parent(s) is/are unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the University of Saint Francis a 2015 IRS Income Tax Return Transcript
  - A 2015 Federal Income Tax Return Transcript can be obtained one of the following ways:
    - Online at [www.irs.gov](http://www.irs.gov)
    - Telephone request at 1-800-908-9946 (long wait times should be expected)
    - Paper request form – IRS Form 4506T-EZ or IRS Form 4506-T
    - IRS2Go App – Apple online store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
    - IRS2Go App – Google Play at <https://play.google.com/store/apps/details?id=gov.irs&hl=en>
- The parent(s) was not/were not employed in 2015 and there was zero income from work in 2015
- The parent(s) was/were employed in 2015 and has listed all employers in the table below, and has attached a 2015 W-2 or 1099 for each employer

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2015	W-2 Attached? (Yes or No)
<b>TOTAL</b>		

Students or parents who have unusual circumstances regarding income information should review the following information for guidance:

**Individuals granted a filing extension by the IRS:**

- Provide to the financial aid office one of the following documents: A copy of the 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 2014; AND
- A copy of the IRS Form W-2 for each source of employment income received for the tax year 2014 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.
- When the extension expires, you will be required to use the IRS DRT tool OR provide the federal income tax return transcript.

**Individuals who filed an Amended IRS Income Tax Return (you must 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; AND
- A signed copy of the 2015 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS

**Individuals who were victims of Tax Administration Identity Theft**

- A victim of tax administration identity theft who is not able to obtain a 2015 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer’s identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer’s 2015 IRS income tax return information.

**Individuals 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 Mariana Islands), or with a foreign country, must provide:
  - A signed copy of that 2015 income tax return OR
  - A transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer’s income and tax information required to be verified for the tax year 2015.

**Step 6 – Child Support Paid**

Did you pay child support because of divorce or separation or as a result of a legal requirement during the calendar year 2015?

\_\_\_\_\_ **Yes.** Please complete the table below.

\_\_\_\_\_ **No.**

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid (cannot be a child listed in Step 1)	Amount of Child Support Paid in 2015

**Step 7 – Untaxed Income for 2015; Parts A – F**

If any item does not apply, enter "N/A" or a "0" where a response is required. Answer each question below as it applies to the student and/or spouse, if an independent student, or as it applies to the parent(s), if a dependent student.

**Step 7, Part A – Payments to tax-deferred pension and retirement savings**

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (i.e. 401(k) or 403(b) plans), including, but not limited to, amounts reported on your 2015 W-2 form(s) in Boxes 12a through 12d with codes D, E, F, G, H and S.

Name of Person Who Made the Payment	Total Amount Paid in 2015

**Step 7, Part B – Child support received**

Name of Person Who Received the Child Support	Name of Child for Whom Support Was Received	Amount of Child Support Received in 2015

**Step 7, Part C – Housing, food and other living allowances paid to members of the military, clergy and others**

Include cash payments and/or the cash value of benefits. **Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2015

**Step 7, Part D – Veterans non-education benefits**

List the total amount of veterans non-education benefits received in 2015. Include Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. **Do not include** federal veterans educational benefits such as Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill.

Name of Recipient	Type of Veterans Non-Education Benefit Received	Amount of Benefit Received in 2015

**Step 7, Part E – Other untaxed income**

List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings account from IRS Form 1040, Line 25, Railroad Retirement Benefits, etc. **Do not include** any items reported or excluded in Parts A – D above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security Benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA), educational benefits, combat pay, and benefits from flexible spending arrangements (i.e. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Amount of Untaxed Income Received in 2015

**Step 7, Part F – Money received or paid on the student's behalf**

List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2015. Include support from a parent whose information was not reported on the student's 2016-2017 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions unless the person is the student's parent whose information is reported on the student's 2016-2017 FAFSA. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Purpose: I.E. Cash, Rent, Books	Amount Received in 2015	Source of funds

**Step 8 – Certification: By signing this worksheet, I certify all the information reported is complete and correct.**

\_\_\_\_\_  
*Student Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Parent Signature (if student is a dependent)*

\_\_\_\_\_  
*Date*