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2016-2017 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
 - o A 2015 Federal Income Tax Return Transcript can be obtained one of the following ways:
 - Online at 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)
TOTAL		

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
 - o A 2015 Federal Income Tax Return Transcript can be obtained one of the following ways:
 - Online at 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)
TOTAL		

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 – 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*