



**2017-2018 Verification Form
Independent Student**

Student Information

Last Name *First Name* *Student ID Number or SSN* *Date of Birth*

Permanent Address *City/State/Zip*

Permanent Phone Number (include area code) *Cell Phone Number (include area code)* *Email Address*

Student's Household Information

Include:

- You, the student
- Your spouse, if married
- Your children if you will provide more than half of their support from July 1, 2017, through June 30, 2018, 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, 2017, through June 30, 2018
- Indicate yes or no for anyone who is or will be enrolled in college at least half-time between July 1, 2017, and June 30, 2018
- Indicate yes or no for anyone in the household that received SNAP (Supplemental Nutrition Assistance Program) benefits

| Full Name | Age | Relationship | Name of College/University (If at least half-time in 2017-2018) | Is or will be enrolled at least ½ time (Yes/No) | Received SNAP Benefits (Yes/No. Circle one.) |
|-----------|-----|--------------|--|--|--|
| | | <i>Self</i> | <i>University of Saint Francis</i> | | <i>Yes No</i> |
| | | | | | Yes No |
| | | | | | Yes No |
| | | | | | Yes No |
| | | | | | Yes No |
| | | | | | Yes No |

Please attach an additional page if necessary.

Income Verification

As part of verification, the Office of Financial Aid is required to collect documentation of your 2015 income. There are two types of income verification. If you (or your spouse, if married) filed a 2015 income tax return with the IRS, complete the Income Verification – Tax Filer section. If you (or your spouse) will not file and are not required to file a 2015 income tax return with the IRS, complete the Income Verification – Non Tax Filer section.

Income Verification – Tax Filer

Complete this section if you (or your spouse, if married) filed a 2015 income tax return with the IRS. The Office of Financial Aid is required to collect your official tax data, either through the FAFSA IRS Data Retrieval Tool (DRT) or via an IRS Tax Return Transcript. A copy of your Tax Return (1040, 1040A, or 1040EZ) is not acceptable for verification purposes. You must complete one of the steps in the chart below.

| Student (and Spouse, if married) |
|---|
| <i>Choose one box below:</i> |
| <input type="checkbox"/> I used the FAFSA's IRS Data Retrieval Tool (DRT) to transfer and submit my (and my spouse's) income information onto the FAFSA. |
| <input type="checkbox"/> I am unable to use the FAFSA's IRS DRT to transfer my (or my spouse's) income information. I have attached a copy of my/our 2015 Federal Tax Return Transcript*, or I will request a copy of a 2015 Federal Tax Return Transcript be mailed to me and will then forward it to the Office of Financial Aid. |
| <input type="checkbox"/> Check this box if one of the following applies to your situation: I filed an Amended 2015 IRS Income Tax Return, I was granted a filing extension by the IRS, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. |

***IRS Tax Return Transcript:** You must request a 2015 Federal Tax Return Transcript directly from the IRS – *not* a photocopy of your tax return. To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Get a tax transcript" link or call 1-800-908-9946. Make sure you request the "IRS tax return transcript" and not the account transcript. You will need your Social Security Number, date of birth, and the address on file with the IRS (this will be the address used when the 2015 IRS Tax return was filed).

Income Verification – Non-Tax Filer

Complete Step 1 and Step 2 of this section if you (and/or your spouse, if married) will not file and are not required to file a 2015 income tax return with the IRS. If you are required to file an income tax return, but have not, you must file your return in order to be considered for Federal Student Aid.

Step 1

Please list all earnings from work during 2015 and attach a 2015 W-2 or 1099-MISC for each line item. Your application is considered incomplete until all earnings from work can be verified with a W-2 or 1099-MISC. Please list \$0 if you did not work in 2015.

| Source of Income from work in 2015 <i>(List employer name or other source that provided the funding)</i> | Amount student received from this source | Amount spouse received from this source | IRS W-2 or 1099 attached? (Yes/No. Circle one) |
|---|--|---|---|
| | \$ | \$ | Yes No |
| | \$ | \$ | Yes No |
| | \$ | \$ | Yes No |

Step 2 – Certification of Non-filing. Please complete and provide signature for each non-filer listed above.

I, _____ (printed student name) certify that I did not file and was not required to file a 2015 income tax return. I have listed all sources of 2015 income and attached all 2015 W-2 forms or Form 1099 in Step 1 above.

Signature: _____ Date: _____

I, _____ (printed spouse name, if non-filer) certify that I did not file and was not required to file a 2015 income tax return. I have listed all sources of 2015 income and attached all 2015 W-2 forms or Form 1099 in Step 1 above.

Signature: _____ Date: _____

Certification and Signature

By signing this worksheet, I certify that all information provided on this form and the attached documentation is true and complete to the best of my knowledge.

***Please note – a typed signature cannot be accepted.**

Student Signature

Date

Students 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 2015.
 - A copy of the IRS Form W-2 for each source of employment income received for the 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.
- 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 who 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.