

2018-2019 Verification Worksheet – Dependent Student

Your 2018–2019 Free Application for Federal Student Aid (FAFSA) was selected for review in process called verification. The law says that before disbursing Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent, whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to the financial aid office. We may ask for additional information, if necessary, for clarification. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed.

A. Dependent Student’s Information – Please fill in with the student’s information.

Student’s Last Name	First Name	M.I.	Student’s ID Number
Permanent 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 – List the people in your parent(s)’ household.

Include:

- Yourself
- Your parent(s) you **live** with (including stepparent), and
- That parents’ other children, if your parent(s) will provide more than half of their support from July 1, 2018 through June 30, 2019, **and/or** the children would be required to provide parental information when applying for Federal Aid, and
- 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 from July 1, 2018 through June 30, 2019.

Also, write in the name of the college for any noted above, **excluding parent(s)**, who will be attending college at least half-time between July 1, 2018 and June 30, 2019, and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship	University/College	Will be Enrolled at Least Half Time
		<i>self</i>	<i>Caldwell University</i>	<i>Yes</i>

If more space is needed, attach a separate page with the student’s name and ID number at the top.

C. Income Information to Be Verified

1. **Tax Return Filers** – **Important Note:** If the student or parent(s) filed/will file an amended 2016 IRS tax return, please contact your financial aid administrator before completing this section.

Instructions: Complete this section if the student and/or parent(s), filed/will file a 2016 income tax return with the IRS.

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log into the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. There will be instructions to determine if the student and/or parent are eligible to use the Tool. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

Check the box that applies for the Student who filed a 2016 Tax Return:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2016 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 2016 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2016 IRS Tax Return Transcript(s)**.

___ Check here if a **2016 IRS Tax Return Transcript(s)** is provided.

Check the box that applies for the Parent(s) who filed a 2016 Tax Return:

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2016 IRS Tax Return Transcript(s)**.

___ Check here if a **2016 IRS Tax Return Transcript(s)** is provided.

****If the parents filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Return Transcript(s)** must be provided for each.**

A **2016 IRS Tax Return Transcript** may be obtained through:

- Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>)

In most cases, for electronic tax return filers, 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2016 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 or obtaining an IRS Tax Return Transcript.

2. **Tax Return Non-filers** – Complete this section if the student and/or parent(s), were not required to file a 2016 income tax return with the IRS.

Check the box that applies for the Student: ONLY if you DID NOT file a Tax Return.

- The student was not employed and had no income earned from work in 2016.
- The student was employed in 2016 and have listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. [Provide copies of all 2016 IRS W-2 forms issued to the student 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	IRS W-2 Provided?	Annual Amount Earned in 2016
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

Check the box that applies for the Parent(s): ONLY if they DID NOT file a Tax Return.

- Neither parent was employed, nor neither had income earned from work in 2016.
- One or both parents were employed in 2016 and have listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. [Provide copies of all 2016 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	IRS W-2 Provided?	Annual Amount Earned in 2016
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

The Parent(s) MUST provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of non-filing is provided.

A **2016 IRS Verification of Non-Filing** required for the Parent(s) ONLY if they did not file - may be obtained through:

- Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request **Verification of Non-filing**
- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request **Verification of Non-filing**
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) - **check box 7**

Certifications and Signatures

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.

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Student’s Signature

Date

Parent’s Signature

Date