



Financial Assistance and Planning Office, Federal School Code: 003280

2015-2016 (V6) VERIFICATION – HOUSEHOLD RESOURCES (Other Untaxed Income)

Your 2015–2016 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Incomplete forms will be returned for completion which will **DELAY** the processing of your financial aid.

STEP 1 – STUDENT INFORMATION

Last Name	First Name	Soc Sec Number	Student ID
Permanent Address		City/State/Zip	
Home Phone	Cell Phone	Email Address	
<u>Marital Status</u>			
STUDENT:		PARENT(s): [Dependent students only]	
<input type="checkbox"/> I am single	<input type="checkbox"/> I am married/remarried	<input type="checkbox"/> Never married	<input type="checkbox"/> Married/remarried
<input type="checkbox"/> I am separated	<input type="checkbox"/> I am divorced or widowed	<input type="checkbox"/> Divorced or separated	<input type="checkbox"/> Widowed
		<input type="checkbox"/> Unmarried and both parents living together	

STEP 2 – FAMILY INFORMATION – please check appropriate box and fill in grid below

☐ DEPENDENT STUDENT*

You MUST include:

- Yourself, your Parent(s) and step-parent(s) even if you do not live with your parents.
- Your parents' dependent children, if your parents will **provide more than half of their support from July 1, 2015 and June 30, 2016 even if they do not live with them.**
- Other people if they now live with your parents, your parents provide **more than half of their support and will continue to do so between July 1, 2015 and June 30, 2016.**
- Identify the people in your parents' household who will be college students between **July 1, 2015 and June 30, 2016.** Do not include the college your parents are attending.

* A student is considered dependent if he/she **was required** to provide parental data on the FAFSA

☐ INDEPENDENT STUDENT**

You MUST include:

- Yourself and your spouse, if married
- Your dependent children, if you will **provide more than half of their support from July 1, 2015 and June 30, 2016 even if they do not live with you.**
- Other people if they now live with you, you provide **more than half of their support and will continue to do so between July 1, 2015 and June 30, 2016.**
- Identify the people in your household who will be college students between **July 1, 2015 and June 30, 2016.**

A student is considered independent if he/she **was NOT required to provide parental data on the FAFSA

	Full Name	Age	Relationship to student	Name of <u>College or University</u> attending (if at least ½ time during 2015-2016)
Examples	Erin A. Smith	18	Self	Keystone College
	Nancy T. Smith	45	parent	
	1		Self	Keystone College
	2			
	3			
	4			
	5			

If you need more space, attach a separate page that includes your name and Social Security Number at the top.

Last Name	First Name	Soc Sec Number	Student ID
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STEP 3 – STUDENT* TAX TRANSCRIPT & INCOME INFORMATION - Year 2014

Are you or will you be required to file a 2014 Federal Income Tax Return?

- ☐ YES, I used IRS Data Retrieval Tool to transfer financial information
- ☐ YES, I am attaching a Federal Tax Return Transcript from the Internal Revenue Service (NOT a copy of a Federal Tax Return)
- ☐ NO, I certify that I have not filed an IRS 1040 for 2014 and I am not required to file an IRS 1040 for 2014.

Complete the table below and attach copies of ALL W-2's only if you did not file taxes. List all employers even if they did not issue a W-2.

If no income write NONE.

Examples	Name	Employer's Name	Amount Earned	W-2 attached?
	Erin A Smith (student)	Burger King	\$2,365.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	1			<input type="checkbox"/> Yes <input type="checkbox"/> No
	2			<input type="checkbox"/> Yes <input type="checkbox"/> No
	3			<input type="checkbox"/> Yes <input type="checkbox"/> No
	4			<input type="checkbox"/> Yes <input type="checkbox"/> No

*If you are an independent student, you must include spouse's information in STEP 4

STEP 4 – PARENT or SPOUSE TAX TRANSCRIPT & INCOME INFORMATION – Year 2014

Are you or will you be required to file a 2014 Federal Income Tax Return?

- ☐ YES, I used IRS Data Retrieval Tool to transfer financial information
- ☐ YES, I am attaching a Federal Tax Return Transcript from the Internal Revenue Service (NOT a copy of a Federal Tax Return)
- ☐ NO, I certify that I have not filed an IRS 1040 for 2014 and I am not required to file an IRS 1040 for 2014.

Complete the table below and attach copies of ALL W-2's only if you did not file taxes. List all employers even if they did not issue a W-2. If no income write NONE.

Examples	Name	Employer's Name	Amount Earned	W-2 attached?
	William A Smith (parent)	Donovan Bros	\$57,598.00	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	2			<input type="checkbox"/> Yes <input type="checkbox"/> No
	3			<input type="checkbox"/> Yes <input type="checkbox"/> No
	4			<input type="checkbox"/> Yes <input type="checkbox"/> No

Tax Transcript Information/Instructions

- To obtain an IRS tax return transcript, go to <http://www.irs.gov/Individuals/Get-Transcript> or call 1-800-908-9946. Make sure to request the "IRS tax return transcript".
- You can also retrieve your financial information by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. Go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections", select the Financial Information section and follow the instructions. Once the data has been successfully transferred, sign and resubmit your FAFSA.
- It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.
- If you or your parents have filed an amended IRS tax return you are required to provide an IRS tax return transcript and an IRS tax account transcript.

Last Name First Name Soc Sec Number Student ID

STEP 5 – SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM OR SNAP (formerly known as food stamps) 2013 or 2014

Complete this section if someone in the student's or student's parent's household (listed in Step 2) received benefits from the Supplemental Nutrition Assistance Program or SNAP any time during the 2013 or 2014 years. Documentation of SNAP benefits may be requested.

STUDENT ☐ YES ☐ NO PARENT ☐ YES ☐ NO **STEP**

6 – CHILD SUPPORT RECEIVED & PAID – YEAR 2014

Did you or your parent/step-parent **RECEIVE** child support in 2014? ☐ NO ☐ YES -- amount \$ _____

Did you or your parent/step-parent **PAY** child support in 2014? ☐ NO ☐ YES – if YES complete chart below

Documentation of child support payments may be requested. If you need more space, attach a separate page that includes your name and Social Security Number at the top.

Example	Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name and Age of Child for Whom Support Was Paid	Amount of Child Support Paid 2014
	Robert Smith	Nancy Smith	Kenneth Smith 10	\$6,000.00
1				
2				
3				

STEP 7 – CERTIFICATION AND SIGNATURES

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. If asked, you will agree to provide information that will verify the accuracy of information provided. The secretary of education has the authority to verify information reported on the FAFSA with the IRS and other agencies. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Student's Signature _____ Date _____

Parent's Signature _____ Date _____

(Parent signature required for dependent students)

- \$ WRITE YOUR NAME, SOCIAL SECURITY NUMBER and/or STUDENT ID on each page of this form
- \$ REMEMBER TO ATTACH ANY REQUESTED DOCUMENTATION
- \$ IF THIS FORM IS *INCOMPLETE* IT WILL BE RETURNED AND FINANCIAL AID WILL NOT BE PROCESSED
- \$ The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and/or your parents reported on your FAFSA. The financial aid administrator at your school will compare your FAFSA with the information on this worksheet and any other required documents. If there are differences, your FAFSA information may need to be corrected. Your school may ask for additional information.

2015-2016 VERIFICATION OF HOUSEHOLD RESOURCES

Your 2015–2016 Free Application for Federal Student Aid (FAFSA) was selected for verification of **Other Untaxed Income**. Incomplete forms will be returned for completion which will **DELAY** the processing of your financial aid.

OTHER UNTAXED INCOME – YEAR 2014

Last Name

First Name

Soc Sec Number

Student ID

If **any item does not apply**, enter N/A for Not Applicable where a response is requested, or enter 0 in an area where an amount is requested. If the student was required to provide parental information on the FAFSA answer each question below as it applies to the student and the student's parent(s) whose information is on the FAFSA. If the student was not required to provide parental information on the FAFSA, answer each question as it applies to the student (and the student's spouse, if married).

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

A. PAYMENTS TO TAX-DEFERRED PENSION AND RETIREMENT SAVINGS—List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plan (e.g. 401(k), or 403 (b) plans, including but not limited to, amounts reported on W-2 forms in Boxes 12a through 12b with codes D, E, F, G, H, and S.

Example	Name of Person Who Paid Made The Payment	Total Amount Paid
	Robert Smith	\$2,000.00
	1.	
	2.	
	3.	

B. 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 received. **Do Not Include** the value of on-base military housing or the value of a basic military allowance for housing.

Example	Name of Recipient	Type of Benefit Received	Amount of Benefit Received
	Jane Smith (Mother)	Housing Allowance-Clergy	\$2,000.00
	1.		
	2.		
	3.		

C. VETERANS NON-EDUCATIONAL BENEFITS—List the total amount of veterans non-education benefits received in 2014. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. **Do not include** federal educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill. or the value of a basic military allowance for housing.

Example	Name of Recipient	Type of Veterans Non-education Benefit	Amount of Benefit Received in 2014
	Robert Smith (Student)	Disability	\$2,000.00
	1.		
	2.		
	3.		

Last Name

First Name

Soc Sec Number

Student ID

D. OTHER UNTAXED INCOME-List the amount of other untaxed income not reported and not included elsewhere on this form. Include Worker's Compensation, Disability, Black Lung Benefits, Railroad Retirement etc. **Do not include** any items reported in A – C above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security, Supplemental Security Income (SSI), Workforce Investment Act (WIA), combat pay, benefits from flexible spending or the value of a basic military allowance for housing.

Example

Name of Recipient	Type of Other Untaxed Income	Amount of Other Untaxed Income Received in 2014
Robert Smith (Father)	Worker's Compensation	\$2,000.00
1.		
2.		
3.		

E. MONEY RECEIVED OR PAID ON THE STUDENT'S BEHALF-List any money received or paid on the student's or parent(s) behalf (e.g. payment of bills, rent, books, cash) not reported elsewhere on this form. Include support from a parent whose information **was not** listed on the student's 2015-2016 FAFSA. Also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parent(s), such as grandparents, aunts, & uncles of the student.

Example

Source	Purpose (e.g. cash, rent, books)	Amount Received in 2014
Robert Smith	Rent	\$2,000.00
1.		
2.		
3.		

F. HAVE YOU RECEIVED ANY OF THE FOLLOWING IN 2014 (check all that apply):

- ☐ WIC (Women, Infants & Children) ☐ SSI (Supplemental Social Security)
☐ SSD (Social Security Disability) ☐ TANF (Temporary Assistance to Needy Families)

CERTIFICATION AND SIGNATURES

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. If asked, you will agree to provide information that will verify the accuracy of information provided. The secretary of education has the authority to verify information reported on the FAFSA with the IRS and other agencies. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Student's Signature _____ Date _____

Parent's Signature _____ Date _____

(Parent signature required for **dependent** students)