

# Keystone College

## 2016-2017 AGGREGATE VERIFICATION WORKSHEET (V5)

Your 2016–2017 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. 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. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

**Warning: This form will be rejected if it is incomplete or illegible...please complete carefully!**

### STEP 1 – STUDENT INFORMATION

Last Name	First Name	Social Security Number	Student ID
Permanent Address	Street & Number	City/State/Zip	
Home Phone	Cell Phone	Email Address	

### STEP 2 – FAMILY INFORMATION: check one of the following/supply information accordingly

☐

**Independent Students:** List the people in your household:

- a. Yourself and your spouse, if married
- b. Your children, if you provide more than half of their support from July 1, 2016 through June 30, 2017
- c. Any other people if they now live with you and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2016 through June 30, 2017.

☐

**Dependent Students:** List the people in your parents' household:

- a. Yourself, your parent(s) you live with (include stepparent), must include both of dependent student's legal (biological and adoptive) parents if they live together regardless of marital status or gender.
- b. Your parents' other children if your parent(s) will provide more than half of their support from July 1, 2016 through June 30, 2017, or if the other children would be required to provide parental information if they were completing a FAFSA for 2016-2017. Include children who meet either of these standards, even if they do not live with your parent(s).
- c. Any other people if they now live with your parents and your parents provided more than half of their support and will continue to provide more than half of their support from July 1, 2016 through June 30, 2017.

Full Name	Age	Relationship to student	Name of College or University (if at least ½ time 2016-2017)
Joshua Jones (EXAMPLE)	24	Self	Example University

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

### STEP 3 – STUDENT OR STUDENT/SPOUSE(FILING JOINT) FILING INFORMATION

Please check one box below that applies to the student or student and spouse (if filing joint):

<input type="checkbox"/>	The student <b>HAS</b> used the data retrieval tool on the FAFSA. The IRS data retrieval tool allows students to transfer their income information from the IRS directly to the FAFSA. If the student used this tool they will NOT need to submit 2015 IRS tax return transcripts.										
<input type="checkbox"/>	The student is <u>unable or chooses not to</u> use the IRS Data Retrieval Tool on the FAFSA, and the student will submit to the school a <b>2015 IRS tax return transcript</b> , instructions attached.										
<input type="checkbox"/>	The student was unemployed and had no income earned from work in 2015 and student will submit a <b>“Verification of Nonfiling”</b> (requests not issued until after June 15, 2016), instructions attached. <b>***verification of nonfiling is NOT required for <u>dependent students</u>***</b>										
<input type="checkbox"/>	<p>The student was employed in 2015 and did not file a tax return. Please list below the names of all the student’s employers, the amount earned from each employer in 2015.</p> <table border="1"><thead><tr><th>Employer’s Name</th><th>Amount Earned</th></tr></thead><tbody><tr><td><i>Suzy’s Auto Body Shop (example)</i></td><td><i>\$2,000.00(example)</i></td></tr><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr></tbody></table> <p><b>-W-2 is required if you check this box and student must submit a “Verification of Nonfiling” , instructions attached.</b> <b>***verification of nonfiling is NOT required for <u>dependent students</u>***</b></p>	Employer’s Name	Amount Earned	<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>						
Employer’s Name	Amount Earned										
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>										

### STEP 4 – PARENT OR SPOUSE(FILING SEPARATE) FILING INFORMATION

Please check one box below that applies to parent(s) or spouse(if filing separately):

<input type="checkbox"/>	The parent(s)/spouse <b>HAVE</b> used the data retrieval tool on the FAFSA. The IRS data retrieval tool allows parent(s)/spouse to transfer their income information from the IRS directly to the FAFSA. If a parent(s)/spouse used this tool they will NOT need to submit tax transcripts.										
<input type="checkbox"/>	The parent(s)/spouse is <u>unable or chooses not to</u> use the IRS Data Retrieval Tool on the FAFSA, and the parent(s)/spouse will submit to the student’s school a copy of the parent(s)/spouse <b>2015 IRS tax return transcript(s)</b> , instructions attached.										
<input type="checkbox"/>	The parent(s)/spouse were unemployed and had no income earned from work in 2015 and will submit a <b>“Verification of Nonfiling”</b> , (requests not issued until after June 15, 2016), instructions attached.										
<input type="checkbox"/>	<p>The parent(s)/spouse were employed in 2015 and did not file a tax return. Please list below the names of all the parent’s/spouse employers, the amount earned from each employer in 2015.</p> <table border="1"><thead><tr><th>Employer’s Name</th><th>Amount Earned</th></tr></thead><tbody><tr><td><i>Suzy’s Auto Body Shop (example)</i></td><td><i>\$2,000.00(example)</i></td></tr><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr></tbody></table> <p><b>-W-2 is required, if you check this box and student must submit a “Verification of Nonfiling” , instructions attached.</b></p>	Employer’s Name	Amount Earned	<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>						
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<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>										

## STEP 5 – SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM OR SNAP (food stamps)

**Check the box that applies.** Complete this section if someone in the student's and/or parent's household (listed in Step 2) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2014 or 2015 calendar years.

☐ One of the persons listed in Step 2 of this worksheet received SNAP benefits in 2014 or 2015. If asked I will provide documentation of the receipt of SNAP benefits.

☐ Does not apply to student, parent or spouse listed in Step 2 of this worksheet.

## STEP 6 – CHILD SUPPORT PAID

**Check the box that applies.** Complete this section if someone in student's or student's parent's household paid child support in 2015.

☐ Student or Spouse paid      ☐ Parent or Step-parent paid      ☐ Did NOT pay child support in 2015

List below the name of the person who paid child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2015 for each child. 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.*

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid 2015
Marty Jones(example)	Chris Smith	Terry Jones /age: 7	\$6,000.00/YEAR
		/age:	
		/age:	
		/age:	
		/age:	

## STEP 7 – UNTAXED INCOME AND ASSET INFORMATION- do not leave any questions blank.

Do not leave any questions blank. If not applicable please put "0". Answer all questions by filling in correct amounts for 2015	Student/Spouse	Parent(s)
Child support received for <b>all</b> of your children. Don't include foster care or adoption payments.	\$ /YEAR	\$ /YEAR
Other untaxed income <b>not reported on the previous questions or accounted for in tax return</b> <input type="checkbox"/> workers' compensation <input type="checkbox"/> disability <input type="checkbox"/> social security <input type="checkbox"/> tax deferred pension/savings <input type="checkbox"/> other	\$ /YEAR	\$ /YEAR
<input type="checkbox"/> Veterans non-educational benefits/ <input type="checkbox"/> Military or Clergy	\$ /YEAR	\$ /YEAR
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ /YEAR	\$ /YEAR

## STEP 8 – Identity and Statement of Educational Purpose

The student must choose (A) or (B) to fulfill the requirements.

- A. Student must appear in person at Keystone College to verify his or her identity by presenting a valid government-issued photo identification, such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.

-In addition the student must sign, in the presence of the institutional official, the attached Statement of Educational Purpose, but if appearing in person, will not need to use the Notary's Certificate.

- B. Student is unable to appear in person at Keystone College to verify his or her identity, the student must provide:
1. A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
  2. The original notarized statement of Educational purpose provided on the next page.

## STEP 9 – CERTIFICATION AND SIGNATURES

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

*\*Please make a copy for your records*

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

## STEP 10 - High School Completion Status

You have been selected for High School Verification by the Department of Education.

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2016-2017:

A copy of the student's high school diploma.

A copy of the student's final official high school transcript that shows the date when the diploma was awarded.

A copy of the student's General Educational Development (GED) certificate, an official GED transcript that indicates the student passed the exam, or a state-authorized high school equivalent certificate.

For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.

An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.

For a homeschooled student from a state where state law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.

For a homeschooled student from a state where state law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

\*\*\*Use this sheet if you chose Step 5- A (to be completed in the presence of a university official)\*\*\*

**STATEMENT OF EDUCATIONAL PURPOSE**

I certify that I \_\_\_\_\_ am the individual signing this

(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Keystone College for 2016-2017.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

University Official \_\_\_\_\_

Print Name

Signature

Date

\*\*\*Use this sheet if you chose Step 5-B (to be completed in the presence of a notary)\*\*\*

\*\*\*If this form is used you must mail to us the original document, we cannot accept fax, scan, or emailed copies\*\*\*

#### STATEMENT OF EDUCATIONAL PURPOSE

I certify that I \_\_\_\_\_ am the individual signing this

(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Keystone College for 2016-2017.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

#### NOTARY'S CERTIFICATE OF ACKNOWLEDGEMENT

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_  
(Date) (Notary's name)

personally appeared, \_\_\_\_\_, and provided to me  
(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of government-issued photo ID provided)

to be the above-named person who signed the forgoing instrument.

**WITNESS my hand and official seal**

\_\_\_\_\_  
(Notary signature)

(seal here)

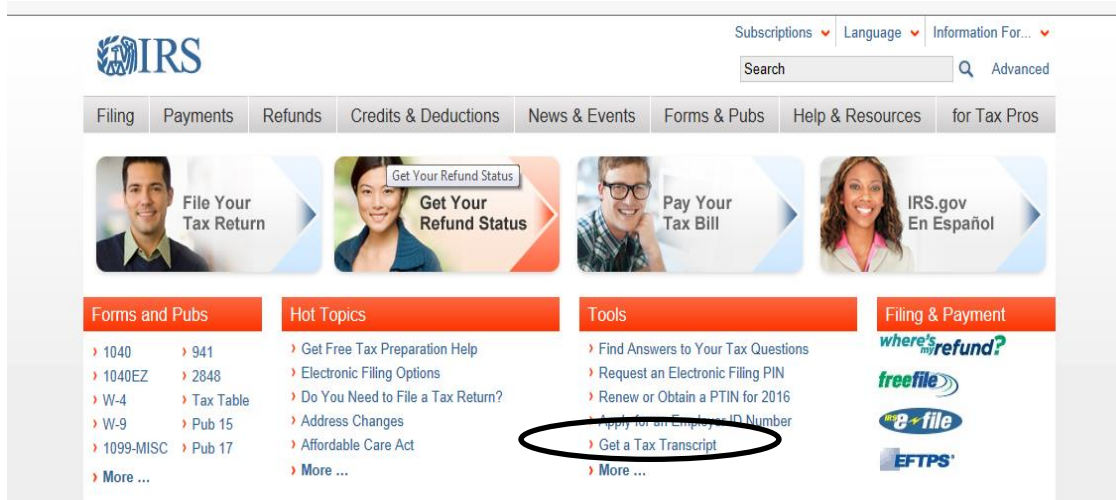
My commission expires on \_\_\_\_\_  
(Date)

# Instructions on Requesting Tax Information

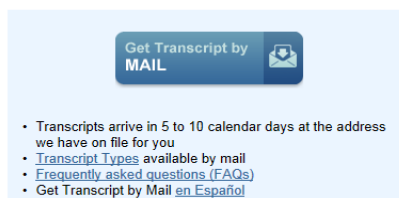
## Requesting a Tax Return Transcript

You will need your Social Security Number, date of birth, a valid email address, and the address on file with the IRS (normally this will be the address used when your 2015 IRS tax return was filed). 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 are married and you and your spouse filed separate 2015 tax returns, you must submit tax return transcripts for both you and your spouse.

- 1) Go to [www.irs.gov](http://www.irs.gov)
- 2) Under tools, select **GET TAX TRANSCRIPT**



- 3) You must choose get transcript by mail,



The IRS never sends email requesting that you obtain or access your transcripts. If you receive such an email, please forward it to our fraud group at [phishing@irs.gov](mailto:phishing@irs.gov).

- 4) Fill out the required information on the screen, the parent will do this for their transcript, the student will do this for theirs. Once the personal information is confirmed make sure to choose RETURN TRANSCRIPT for the 2015 Tax Year. The tax return transcript should arrive to the parent and student within 5-10 days.

A screenshot of the IRS 'Get Transcript' form. At the top, there's a header with the IRS logo and 'Contact Us | Exit'. Below the header is the title 'Get Transcript'. The form has two main sections: 'Select Account Transcript' and 'Select Transcript Type'. The 'Select Account Transcript' section has a dropdown menu with 'Return Transcript' selected. The 'Select Transcript Type' section has a dropdown menu with 'Select' selected. Below these sections is a 'Continue' button. To the right of the form, there's a box with the text 'Make sure to choose RETURN TRANSCRIPT'.

## **Requesting Documents for Amended Tax Returns**

If you or your parent(s)/spouse have filed an amended IRS tax return you are required to provide the documents below to complete verification.

- A copy of the 2015 IRS Tax Return Transcript(per above instructions), or any IRS tax transcript that includes all of the income and tax information required to be verified, and
- A signed copy of the 2015 IRS Form 1040X that was filed with the IRS.

## **Request for Verification of Non-Filing Letter**

Non tax filers must request a Verification of Nonfiling Letter from the Internal Revenue Service (IRS), free of charge. You can only request via mail. Please note that current year requests are only available after June 15<sup>th</sup>.

### **Paper Request**

1. Download the IRS Form 4506T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
2. Print form off and complete lines 1-4. On line 7, check the box to indicate you would like to receive a Verification of Nonfiling, proof that you did not file a return for the year
3. On line 9 indicate the ending date on the year or period. For 16-17 verification the date should be 12/31/2015.
4. Mail or fax the form to the correct location based on where you live. Use 2<sup>nd</sup> Page of 45067T to determine this address or fax number.
5. The Verification Letter of Nonfiling will be mailed to you within 10 business days.