

# 2017-2018 Verification Worksheet

## Dependent Student VD5

Your 2017–2018 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 your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and one parent whose information is on the FAFSA must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the Campus Financial Services Center. We may ask for additional information. If you have questions about verification, contact Campus Financial Services Center as soon as possible so that your financial aid will not be delayed.

### A. STUDENT’S INFORMATION

Student’s Last Name	Student’s First Name	Student’s M.I.	Student’s I.D.# - or- Social Security Number
Student’s 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. HOUSEHOLD INFORMATION (“Parent” refers to the parent(s) listed on FAFSA)

NUMBER IN HOUSEHOLD: List below the people in the parents’ household. Include:

- The student
- The parents (including a stepparent), even if the student doesn’t live with the parent(s)
- The parents’ other children if the parents will provide more than half of their support from July 1, 2017, through June 30, 2018, or if the other children would be required to provide parental information if they were completing a FAFSA for 2017–2018. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.

NUMBER IN COLLEGE: For any household member who will be enrolled at least half time in a degree, diploma, or certificate program (not dual-enrolled) at an eligible postsecondary educational institution any time between July 1, 2017, and June 30, 2018, include the name of the college below.

Full Name	Age	Relationship	College in 2017-2018	Will be Enrolled at least HT? (Yes or No)
		<i>Self</i>	<i>Saginaw Valley State University</i>	

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

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

**C. STUDENT’S INCOME INFORMATION**

**DID YOU FILE A 2015 TAX RETURN?** **YES** (complete section 1 only) **NO** (complete section 2 only)

**1. TAX RETURN FILERS:** Complete this section if the student filed, or will file, a **2015** IRS income tax return

*The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](http://FAFSA.gov). In most cases, no further documentation is needed to verify 2015 IRS income tax return information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed. In most cases, for electronic filers, 2015 IRS income tax return information for the IRS DRT or Tax Return Transcript request is available within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or Tax Return Transcript request within 6-8 weeks after the 2015 paper IRS income tax return has been received by the IRS. If an amended return was filed, you must submit a signed copy of the 2015 IRS Form 1040X, Amended Federal Tax Return. Contact Campus Financial Services Center if more information is needed.*

**Check the box that applies:**

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student’s FAFSA
- The student completed verification in 2016-17 and provided a **2015 IRS Tax Return Transcript at that time.**
- 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 **2015 IRS Tax Return Transcript.**

A **2015 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to [www.irs.gov](http://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."
- Get Transcript ONLINE – Go to [www.irs.gov](http://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."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

**2. NONFILERS** Complete this section if the student did not file and is not required to file a 2015 income tax return with the IRS.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2015.
- The student **was** employed in 2015 and has listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form was generated.  
Student must submit **all 2015 W-2s**.

**By checking either box, and signing this form, the student certifies that they DID NOT FILE a 2015 Federal Tax Return.**

Employer’s Name <i>List every employer even if the employer did not issue an IRS W-2 form.</i>	IRS W-2 Provided?	Annual Amount Earned in 2015
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>

**D. PARENT’S INCOME INFORMATION** The instructions below apply to each parent included in the household

**DID YOUR PARENTS FILE A 2015 TAX RETURN? YES** (complete section 1 only) **NO** (complete section 2 only)

**1. TAX RETURN FILERS:**

Complete this section if the parents filed or will file a 2015 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](http://FAFSA.gov).* In most cases, no further documentation is needed to verify 2015 IRS income tax return information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic filers, 2015 IRS income tax return information for the IRS DRT or IRS Tax Return Transcript request is available within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or IRS Tax Return Transcript request within 6-8 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact Campus Financial Services Center if more information is needed. If an amended return was filed, you must submit a signed copy of the 2015 IRS Form 1040X, Amended Federal Tax Return. If parents filed separate 2015 IRS income tax returns, the IRS DRT cannot be used and the 2015 IRS Tax Return transcript must be provided for each.

**Check the box that applies:**

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student’s FAFSA
- The parents completed verification in 2016-17 and provided a **2015 IRS Tax Return Transcript at that time.**
- 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 **2015 IRS Tax Return Transcript.**

A **2015 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to [www.irs.gov](http://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."
- Get Transcript ONLINE – Go to [www.irs.gov](http://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."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

**2. NONFILERS** Complete this section if the parents did not file and are not required to file a 2015 income tax return with the IRS.

**Check the box that applies:**

- Neither parent was employed and neither had income earned from work in 2015.
- One or both parents **were** employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form was generated. Parent(s) must submit **all 2015 W-2s**.

**By checking either box, and signing this form, the parents certify that they DID NOT FILE a 2015 Federal Tax Return.**

Employer’s Name <i>List every employer even if the employer did not issue an IRS W-2 form.</i>	IRS W-2 Provided?	Annual Amount Earned in 2015
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>

**E. HIGH SCHOOL COMPLETION STATUS**

Provide one of the following documents to indicate the student's high school completion status when the student begins college in 2017–2018: *A student who is unable to obtain the documentation listed below must contact the financial aid office*

- A copy of the student's high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- 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 student who was homeschooled in a state where state law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (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.

**F. Documentation of Identity and Statement of Educational Purpose**

Check the box to indicate which form you will be submitting

- The student will appear in person at Saginaw Valley State University Campus Financial Services Center (CFCS) to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), 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 by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose which will be provided at the CFCS.
- If the student is unable to appear in person at Saginaw Valley State University Campus Financial Services Center (CFCS) to verify his or her identity, the student must provide to the institution:
  - a. A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
  - b. The **original** (no copies or faxes) Statement of Educational Purpose provided on the last page, **which must be notarized**.

**G. CERTIFICATION 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 on this worksheet, you may be fined, be sentenced to jail, or both.**

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

*Submit this worksheet to the Campus Financial Services Center at SVSU.  
7400 Bay Road University Center, MI 48710  
FAX: 989 964 4291*

*You should make a copy of this worksheet for your records.  
Do not mail this worksheet to the U.S. Department of Education.*

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**Verification of 2015 Income Information for Individuals with Unusual Tax Situations**

**Individuals Granted a Filing Extension by the IRS**

An individual who is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- A copy of 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 which expires 10/17/16
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2016;
- A copy of IRS Form W-2 for each source of employment income received for tax year 2015,
- 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; **and**
- A 2014 IRS Tax Return Transcript

**Individuals Who Filed an Amended IRS Income Tax Return**

An individual who filed an amended IRS income tax return for tax year 2015 must provide:

- A **2015 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **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 IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified. Tax filers may obtain a TRDBV transcript and inform the IRS of the tax-related identity theft, by calling the IRS's Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. The IPSU will first authenticate the identity of the tax filer, who can then ask the IRS to mail them a TRDBV transcript.; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft. Provide a signed copy of the IRS Form 14039 "Identity Theft Affidavit", if one was submitted to the IRS.

**Individuals Who Filed Non-IRS Income Tax Returns**

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority

**Identity and Statement of Educational Purpose  
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at Saginaw Valley State University to verify his or her identity, the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**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 \_\_\_\_\_ for 2017-2018.

(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(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 unexpired government-issued photo ID provided)

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

**WITNESS my hand and official seal**  
(seal)

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

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

**MUST SUBMIT ORIGINAL TO SVSU. No copies or faxes accepted.**  
SVSU, Campus Financial Services Center, 7400 Bay Road University Center, MI 48710