

2017-2018 Verification Worksheet

Dependent Student – University of Dubuque – (V4/V5)

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 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 must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. 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.

A. Dependent Student’s Information

Student’s Last Name	Student’s First Name	Student’s M.I.	Student’s SSN
Student’s Street Address (include apt. #)			Student’s Date of Birth
City	State	Zip Code	Student’s E-Mail Address
Student’s Home Phone Number (include Area Code)			Student’s Alternative or Cell Phone Number

B. Dependent Student’s Family Information

WHO TO INCLUDE IN THIS SECTION:

- **Yourself** and your parent(s) including a step-parent) even if you don’t live with your parent(s).
- Your parent(s) other children if your parent(s) 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 they do not live with your parent(s).
- 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 through June 30, 2018.
- Include the name of the college for any household member, EXCLUDING PARENT(S), who will be enrolled, **at least half time** in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2017, and June 30, 2018. *If more space is needed, attach a separate page with the student’s name and Social Security Number at the top.*

FULL NAME	AGE	RELATIONSHIP	COLLEGE ATTENDING in 2017-2018 <small>(only list college if student is less than 24 years of age)</small>	ENROLLED at LEAST HALF TIME in ‘17- ‘18? Y/N
		(SELF)		

Student Name: _____ Student ID Number: _____

C: STUDENT INCOME INFORMATION to BE VERIFIED: (Please check the applicable boxes and then follow the corresponding instructions.)

STUDENT filed taxes in 2015: _____ YES (complete **Option A** below and **SKIP to Sec D**)
 STUDENT **did not** file taxes, but did earn wages from working: _____ YES (SKIP to **Option B** below)
 STUDENT was not employed and had no income earned from work in 2015. _____ YES (SKIP to **Section D - Parent Information**)

OPTION A: The best way to verify income is by using the **IRS Data Retrieval Tool** that is part of FAFSA on the Web. If the student has not already used the tool, go to www.FAFSA.gov, log in to the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into the student’s FAFSA. **NOTE:** Once your taxes have been filed, you must wait up to two weeks (for electronic filers) and up to eight weeks for paper IRS tax return filers before you can access the Data Retrieval Tool. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

If you are unable to use the IRS Data Retrieval Tool, then you must go to www.irs.gov and print off an official IRS Tax Return Transcript. (**NOTE:** there is a Tax Account Transcript, but we cannot use that form.)

Check the box that applies: _____ used the Data Retrieval Tool (_____ date used) _____ will use the Data Retrieval Tool
 _____ IRS Tax Return Transcript is attached _____ will send IRS Tax Return Transcript later

OPTION B: ONLY COMPLETE THIS SECTION IF YOU DID NOT FILE TAXES. List all names of employers and the amount earned for each job. **PLEASE ATTACH the 2015 W2s supporting this information.**

Employer’s Name	2015 Wages Earned

D. PARENT INCOME INFORMATION to BE VERIFIED: (Please check the applicable boxes and follow the corresponding instructions.)

PARENT filed taxes in 2015: _____ YES (complete **Option A** below and **SKIP to Sec E**)
 PARENT **did not** file taxes, but did earn wages from working: _____ YES (SKIP to **Option B** below)
 PARENT was not employed and had no income earned from work in 2015. _____ YES (SKIP to **Section E** on following page)

OPTION A: The best way to verify income is by using the **IRS Data Retrieval Tool** that is part of FAFSA on the Web. If the parent has not already used the tool, go to www.FAFSA.gov, log in to the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent is eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into the student’s FAFSA. **NOTE:** Once your taxes have been filed, you must wait up to two weeks (for electronic filers) and up to eight weeks for paper IRS tax return filers before you can access the Data Retrieval Tool. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

If you are unable to use the IRS Data Retrieval Tool, then you must go to www.irs.gov and print off an official IRS Tax Return Transcript. (**NOTE:** there is a Tax Account Transcript, but we cannot use that form.)

Check the box that applies: _____ used the Data Retrieval Tool (_____ date used) _____ will use the Data Retrieval Tool
 _____ IRS Tax Return Transcript is attached _____ will send IRS Tax Return Transcript later

OPTION B: ONLY COMPLETE THIS SECTION IF YOU DID NOT FILE TAXES. List all names of employers and the amount earned for each job. **PLEASE ATTACH the 2015W2s supporting this information.**

Employer’s Name	2015 Wages Earned

Student Name: _____ Student ID Number: _____

E. SOURCES OF INCOME FOR LIVING EXPENSES

1. Complete this section if the student's parent's **did not file taxes AND did not have any earned income in 2015.**

Name of Federal/State Assistance Program You are Receiving Assistance From	Amount of Aid Received in 2015

F. STUDENT'S HIGH SCHOOL COMPLETION STATUS

Please check the option that applies to the incoming student regarding their education status prior to attending college. This documentation is part of the admissions process at the university, so there is no need to attach it here. If additional documentation is required, your financial aid office will notify you.

- High school diploma or high school transcript including graduation date.
- Official documentation from high school counselor stating your graduation date and reason why high school diploma/transcript is unavailable.
- General Education Development (GED) Certificate.
- State certificate stating you have passed a State-authorized examination recognized as equivalent to diploma.
- Homeschooled student, w/ a transcript or equivalent, signed by parent or guardian, listing secondary school courses you have completed and documentation that you have successfully completed secondary school education.
- Homeschooled with a secondary school completion credential provided under State law.
- Completed a two-year program (ex. Associate's degree) acceptable for full credit toward a bachelor's degree.

Student Name: _____ Student ID Number: _____

G. Student’s and Parent’s 2015 Untaxed Income (if both parents report amounts, please combine amounts).

Source of Untaxed Income	\$ Amt of Student’s Untaxed Income	\$ Amt of Parent’s Untaxed Income
a. Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D,E,F,G,H and S. DON’T INCLUDE amounts reported in code DD (employer contributions toward employee health benefits).		
b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040A – line 17.		
c. Child support RECEIVED for any of your children. DON’T INCLUDE foster care or adoption payments.		
d. Tax exempt interest income form IRS Form 1040 – line 8b or 1040A – line 8b.		
e. Untaxed portions of IRA distributions from IRS Form 1040 – lines (15a minus 15b) or 1040A – lines (11a minus 11b). EXCLUDE ROLLOVERS . If negative, enter a zero here.		
f. Untaxed portions of pensions from IRS Form 1040 – lines (16a minus 16b) or 1040A – lines (12a minus 12b). EXCLUDE ROLLOVERS . If negative, enter a zero here.		
g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). DON’T INCLUDE the value of on-base military housing or the value of a basic military allowance for housing.		
h. Veteran’s non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.		
i. Other untaxed income not reported in items a through h, such as workers’ compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS 1040 – line 25. DON’T INCLUDE extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.		
j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and that is not part of a legal child support agreement.		N/A

