

VERIFICATION WORKSHEET VERSION 1

2018 - 2019

Due to the information provided in your 2018-2019 Free Application for Federal Student Aid (FAFSA), your form was selected for review in a process called *Verification*. The FAFSA will be compared to the information on this worksheet, along with any other required documents. If there are inconsistencies, the FAFSA may need to be corrected. Your parent(s) must complete and sign this worksheet, then submit it (with all other requested documents) to the College's Student Financial Services Office.

This process takes **14 business days from the time that all requested documents are received (i.e., this does not count any time for necessary corrections)**. Please be advised that it may take longer during times of peak activity at the College (i.e., the beginning of the fall and spring). **For this reason, it is essential to check the College's Calendar for the Financial Aid Guaranteed Deadline during the term of enrollment.** Forms are located online at: polk.edu (click on Admission & Aid, then Financial Aid, and then Forms (left tabs)). Questions about verification should be directed to the Student Financial Services Office as soon as possible to prevent delay in receipt of financial aid.

Student Name (Please Print): _____ Student ID: _____

Contact Phone Number: _____ Term: _____

A. Dependency Status and Family Information: (Please read, select the applicable choice, and fill in the table.)

_____ **Independent:** A student is considered independent if he or she is married, has a child that he or she must take care of 51% of the year, serves in the military, is a veteran, or is a qualified unaccompanied youth.

Please include in the table below: (Please do not use abbreviations.)

- Your spouse/partner's name, age, and dependent child(ren) that he or she he will provide more than half of the support for, including if the child(ren) would be required to provide parent information when applying for financial aid.
- List other people only if they live with **you and your spouse/partner now, and** if you and/or your spouse/partner provide more than half of their support, **and** you will continue to provide it from July 1, 2018 through June 30, 2019.
- Include the name of the **college** attended by each household member who has already earned a high school diploma/GED and who will be enrolled as at **least a half-time student** from July 1, 2018 through June 30, 2019.

_____ **Dependent:** A depended is a student who was required to provide parental data on the FAFSA. This includes students who do not live with their parents, and **do not** fall in the following categories: married, financially supporting a child at 51% (from July 1, 2018 through June 30, 2019), those serving in the military, veterans, or qualified unaccompanied youths.

Please include in the table below: (Please do not use abbreviations.)

- The names and ages of parents/stepparents *who provide more than half of your financial support.*
- Your parents' or stepparent's dependent children, if your parents/stepparent will provide more than half of their support, or if the children would be required to provide parent information when applying for financial aid.
- List other people only if they live with your parent(s), **and** if your parent(s) provide more than half of their support, **and** they will continue to provide this support from July 1, 2018 through June 30, 2019.
- Include the name of the **college** attended by each household member who will be enrolled as at **least a half-time student** between from July 1, 2018 through June 30, 2019.

<u>First, Last Name:</u>	<u>Age:</u>	<u>Relationship:</u>	<u>Full College Name:</u>
Student (YOU): _____	_____	Self	Polk State College
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

B. Tax Return/Income Verification: (Please check the line that applies.)

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA and is available at www.FAFSA.gov. If the IRS Data Tool was not used in the application, the student should log into the FAFSA, click on "Make FAFSA Corrections," then on the *Financial Information* section. This section provides instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2016 income tax information into the FAFSA. **Please be advised that individuals who used the "Married, Filing Separately" option to file taxes cannot use this tool.**

Student/Spouse (if married):

- I have used the IRS Data Retrieval Tool to transfer my *2016 Income Tax Return* information. (**Go to Section D.**)
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the *2016 Tax Transcript* (www.irs.gov) (**Go to Section D.**)
- I certify that I did not, will not, and am not required to file a *2016 Income Tax Return*. (**Go to Section C.**)
- I amended the *2016 Tax Return*. **Attach** a signed **copy of the 1040X Form and Tax Transcripts**. (**Go to Section D.**)
- I have filed for an extension of the 2016 tax year and have attached a copy of *IRS Form 4868*, the approval of the extension, a signed *IRS 1040 Form, W-2 Forms*, and a signed statement (if self-employed) certifying the Adjusted Gross Income (AGI) and the U.S. income tax paid for 2016.
- I am a victim of identity theft and **have attached** the *Tax Return Database View Transcript* (TRDBV) from the IRS or any other IRS tax transcripts that include all of the income and tax information that require verification within the process, as well as a signed and dated statement from the tax filer. (To obtain documents or assistance, contact the IRS at 1.800.908.4490.)

Parent(s)/Step-Parents:

- I/We have used the IRS Data Retrieval Tool to transfer *2016 Income Tax Return* information. (**Go to Section D.**)
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the *2016 Tax Transcript* (www.irs.gov) (**Go to Section D.**)
- I/We certify that I/We did not, will not, and am/are not required to file a *2016 U.S. Income Tax Return*. (**Go to Section C.**)
- I/We amended the *2016 Tax Return*. **Attach** a signed **copy of the 1040X Form and tax transcripts**. (**Go to Section D.**)
- I/We have filed an extension for the 2016 tax year and have attached a copy of *IRS Form 4868*, the approval of the extension, a signed *IRS 1040 Form, W-2 Forms*, and a signed statement (if self-employed) certifying the Adjusted Gross Income (AGI) and the U.S. income tax paid for 2016.
- I am/We are victim(s) of identity theft and **have attached** the *Tax Return Database View Transcript* (TRDBV) from the IRS or any other IRS tax transcripts that include the income and tax information that require verification within the process, as well as a signed and dated statement from the tax filer. (To obtain documents or assistance, contact the IRS at 1-800-908-4490.)

C. Non-Tax Filers Income Information: (Please read below and fill in the box.)

- If you earned an income in 2016 and were not required to file a *2016 Income Tax Return*, **list your employer(s)** below and **any other income received**. (Note: In most situations, a total income above \$10,150 requires that a Tax Return to be filed.)
- Attach all earning statements such as *W-2 Forms* and/or *1099 Forms*. If you do not have a *1099 Form* and worked for yourself, please provide a signed statement that includes the source of income, total taxes paid, and the Adjusted Gross Income (AGI).
- If you do not have a *1099 Form* and did not work, please provide a signed statement that includes your source of income, total tax paid, and the Adjusted Gross Income (AGI).

If for any reason the information you provide is questionable based on professional judgment, the College may require additional documentation. Please do not leave this section blank. If an area is not applicable, enter "N/A."

<u>Employer Name/Source of Income</u>	<u>W-2 and/or 2016 1099 forms attached?</u> (Please check.)	<u>Student 2016 Annual Amount</u>	<u>Parent(s)/Step-Parent Annual Amount</u>
1. _____	___ Yes ___ No	_____	_____
2. _____	___ Yes ___ No	_____	_____
3. _____	___ Yes ___ No	_____	_____
4. _____	___ Yes ___ No	_____	_____

Note: In most situations, a total income of \$10,150 or more requires that a Tax Return to be filed. If this applies, please do not complete this section. Instead, submit a 2016 Tax Return Form to the IRS, and then bring your signed 2016 Tax Return the College complete the verification process.

D. Untaxed and Investment Income: (Do not leave this section blank.)

Even if the student and parent(s)/step-parent fall(s) have situations that pertain to the above sections, all individual(s) must complete this section in its entirety. (**Attach all relevant W-2 and/or 1099 Forms.**)

Sources of Untaxed Income

Do you have an IRA Distribution from your IRS Form, 1040, or 1040A rollover amount?

Student (2016 Amount)

YES: ___ NO: ___

Parent(s)/Step-Parent (2016 Amount)

YES: ___ NO: ___

Do you have a pension distribution from your IRS form, 1040, or 1040A rollover amount?

YES: ___ NO: ___

YES: ___ NO: ___

Do you have other untaxed income or benefits not mentioned on this form? List this income in Section C of this form.

YES: ___ NO: ___

YES: ___ NO: ___

Student Signature

Date

Parent Signature (if dependent)

Date

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