

# Student Financial Services

# **VERIFICATION WORKSHEET VERSION 5**

2019 - 2020

Due to the information provided in your 2019-2020 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.)

- **Dependent:** A dependent 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. 2019 through June 30, 2020), those serving in the military, veterans, or gualified unaccompanied youths. Please include the following information on the table below. (Please do not abbreviate.)
  - Parents/stepparent 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 the support, and they will continue to provide it from July 1, 2019 through June 30, 2020.
  - Include the name of the college attended by each household member who will be attending at least as a half-time . student between from July 1, 2019 through June 30, 2020.

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 gualified unaccompanied youth. Please include the following information on the table: (Please do not use abbreviations.)

- You and your spouse (if married).
- Your dependent children, if you provide more than half of their support.
- Other people that are part of the household, only if they now live with you, and you provide more than half of their support, and you will continue to provide more than half their support from July 1, 2019 through June 30, 2020.
- The name of the college of each household member who will be attending at least as a half-time student between from July 1, 2019 through June 30, 2020.

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



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### 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 <u>www.FAFSA.gov</u>. 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 2017 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 2017 Income Tax Return information (Go to Section D.)
- I did not use the IRS Data Retrieval Tool. Attach a copy of the 2017 Tax Transcript (www.irs.gov) or a signed 2017 Tax Return. A signature belongs on the second page of the Tax Return. (Go to Section D.)
- \_\_\_\_ I certify that I did not, will not, and am not required to file a 2017 Income Tax Return. (Go to Section C.)
- \_\_\_\_ I amended the 2017 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 2017 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 2017.
- 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 2017 Income Tax Return information. (Go to Section D.)
- \_\_\_\_ I did not use the IRS Data Retrieval Tool. Attach a copy of the 2017 Tax Transcript (www.irs.gov) or a signed 2017 Tax Return. The signature belongs on the second page of the Tax Return Form. (Go to Section D.)
- \_\_\_\_ I/We certify that I/We did not, will not, and am/are not required to file a 2017 U.S. Income Tax Return. (Go to Section C.)
- \_\_\_\_ IWe amended the 2017 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 2017 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 2017.
- \_\_\_\_\_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 2017 and were not required to file a 2017 Income Tax Return, <u>list your employer(s)</u> 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."

Employer Name/Source of Income	<u>W-2 and/</u> or 2017 1099 forms attached? (Please check.)	Student 2017 Annual Amount	Parent(s)/Step-Parent Annual Amount
1	YesNo		
2	YesNo		
3	YesNo		
4	YesNo		



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

Even if the student and parent(s)/step-parent have situations that pertain to the above sections, all individual(s) must complete this section in its entirety and attach all relevant *W-2 Forms* and/or *1099 Forms*. If an individual does not have a *1099 Form* and has not worked, please provide a signed statement that includes the source of your income, total tax paid, and the Adjusted Gross Income (AGI).

Sources of Untaxed Income	Student (2017 Amount)		Parent(s)/Step-Parent (2017 Amount)		
Do you have an IRA Distribution from your IRS Form, 1040, or 1040A rollover amount?	YES:	NO:	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:	

# E. High School Completion Status: (Please select the situation describes the student's completion status.) High School Diploma Please include a copy of the high school Description Status: Please include a copy of the GED Certificate

Please include a copy of the high school diploma or copy of the final high school transcript that includes the date of completion.

### State Certificate

Please provide a copy of the certificate that the student received after passing a stateauthorized examination that is recognized as the equivalent of a diploma.

# Completion of Secondary Education

in a Foreign Country

Please provide documentation via a "secondary school leaving certificate" (or another similar document) that shows completion of secondary education.

### Associate Program Completion

or an official copy of the GED Transcript.

Please provide evidence of an official transcript showing that the student completed at least a two-year degree that is acceptable for full credit toward a baccalaureate degree.

### \_ Home Schooled Students

Please provide a transcript (or the equivalent) that is signed by the student's parent or guardian and lists the secondary courses that the student completed. Please also submit a statement that the student successfully completed a secondary school education in a home-school setting.

Validity of Identification and Statement of Educational Purpose: Please check the situation above that indicates your high school completion status. Please submit in person an unexpired, valid, government-issued photo identification. Identification cards may include, but are not limited to, a driver's license, state-issued identification, military identification, or passport. Please note: Copies will not be accepted under any circumstance.

I, \_\_\_\_\_\_, (the student) certify that I am the individual signing this *Statement of Educational Purpose* and that any federal financial aid assistance I receive will only be used for educational purposes, including the cost of attending Polk State College during Academic Year 2019-2020.

NOTARY STAMP

DATE

Signature of Notary

Received By (Student Financial Services Employee Only)

**Student Signature** 

Date

Parent Signature (if dependent)/Spouse

Date

Office of Student Financial Services 999 Avenue H NE Winter Haven, FL 33881-4299 Phone: 863.297.1004 Fax: 863.298.6850; E-mail: financialaid@polk.edu