

# 2017–2018 Verification Worksheet

## Dependent Student

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 at least one parent 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. Student's Information

Student's Last Name	Student's First Name	Student's M.I.	XXX-XX Last Four of Student's Social
Student's Street Address (include apt. no.)			Student's E-mail Address
City	State	Zip Code	
Student's Primary Phone Number			

### B. Student's Family Information

List below the people in your parent(s)' household. Include:

- **Yourself**
- **Your parent(s)** (including a stepparent) 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 your 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 to Student (ex: Mother, Father, Sibling)	College Attending (between 7-1-2017 & 6-30-2018)
1.			Self	Gwynedd Mercy University
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

## C. Student's Income Information to be Verified

### 1. TAX RETURN FILERS

**Important Note:** If the student filed, or will file, an amended 2015 IRS tax return, the student must contact the financial aid administrator before completing this section.

**Instructions:** Complete this section if the student, filed or will file a 2016 income tax return with the IRS. 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 [FAFSA.gov](http://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 2016 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

#### Check the box that applies:

- The student has used the **IRS Data Retrieval Tool** on the initial FAFSA or when making a correction to the FAFSA. The student's school will use the IRS information that was transferred in the verification process.
- The student has not yet used the IRS Data Retrieval Tool, but will use the tool once the student has filed a 2015 IRS tax return. See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.
- The student is unable or chooses not to use the IRS Data Retrieval Tool and will submit a **2016 IRS tax return transcript—not a photocopy of the income tax return**. To obtain an IRS tax return transcript go to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript). Click on get transcript online. Create an account with the IRS (if you already have one, skip this step). Once an account has been created, log in. Indicate the reason for requesting the transcript is "Higher Education/Student Aid". The Return Transcript will be boxed and highlighted – select year "2015". Be sure to disable the pop-up blocker in order to receive the PDF version of your Tax Return Transcript. Attach the 2015 IRS tax return transcript to the verification worksheet

If the student and spouse filed separate 2016 IRS income tax returns, **2016 IRS Tax Return Transcripts** must be provided for both

### 2. TAX RETURN NONFILERS (Skip this section if you are a tax return filer)

**Instructions:** Complete this section **ONLY** if the student will not file and is not required to file a 2016 income tax return with the IRS.

- The student was not employed and had no income earned from work in 2016.
- The student was employed in 2016 and has listed below the names of all the student's employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is attached. Attach copies of all 2016 IRS W-2 forms issued to the student by employers. List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

Employer (Name of Company)	2016 Amount Earned (ex: \$2,000)	IRS W2 Attached Ex: Yes/No

## D. Parent's Income Information to be Verified

### 1. TAX RETURN FILERS

**Important Note:** If the student's parent(s), filed or will file, an amended 2016 IRS tax return the student's financial aid administrator must be contacted before completing this section.

**Instructions:** Complete this section if the student's parent(s) filed or will file a 2016 income tax return with the IRS. 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's parent(s) has not already used the tool, the parent and the student should go to [FAFSA.gov](http://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(s) is eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.

**Check the box that applies:**

- The student's parent has used the **IRS Data Retrieval Tool** in FAFSA on the Web on the initial FAFSA or when making a correction to the FAFSA.  
*The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2016 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed.  
*See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*
- The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2016 IRS tax return transcript(s)**—not photocopies of the income tax return.  
*To obtain an IRS tax return transcript go to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript). Click on get transcript online. Create an account with the IRS (if you already have one, skip this step). Once an account has been created, log in. Indicate the reason for requesting the transcript is "Higher Education/Student Aid". The Return Transcript will be boxed and highlighted – select year "2016". Be sure to disable the pop-up blocker in order to receive the PDF version of your Tax Return Transcript. Attach the 2016 IRS tax return transcript to the verification worksheet*

### 2. TAX RETURN NONFILERS (Skip this section if you are a tax return filer)

**Instructions:** Complete this section if the student's parent(s) will not file and is not required to file a 2016 income tax return with the IRS.

**Check the box that applies:**

- The parent(s) was not employed and had no income earned from work in 2015.
- The parent(s) was employed in 2016 and has listed below the names of all the parent's employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is attached. Attach copies of all 2016 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer (Name of Company)	2016 Amount Earned (ex: \$2,000)	IRS W2 Attached Ex: Yes/No

## E. Payments to tax deferred pensions and retirement plans

**Important Note:** *If any item does not apply or appears blank on your W2's, you must enter \$0. This section must be completed with a numeric number.*

**Instructions:** Please list any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S **only**.

Form **W-2** Wage and Tax Statement

Student		Parent	
12 D	\$ _____	12 D	\$ _____
12 E	\$ _____	12 E	\$ _____
12 F	\$ _____	12 F	\$ _____
12 G	\$ _____	12 G	\$ _____
12 H	\$ _____	12 H	\$ _____
12 S	\$ _____	12 S	\$ _____

## F. Parent's Other Income Information to be Verified

Check the box if applies:

- One (or both) of the student's parents listed in Section B of this worksheet paid child support in 2016. The parent has indicated below the name of the person who paid the 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 2016 for each child. If asked by the school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes the student's 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 in 2016
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

## G. Certification and Signatures

Each person signing this worksheet certifies that all of the Information reported on it is complete and correct. The student and one parent 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