◯ Universidad Metropolitana
◯ Universidad del Este
◯ Universidad del Turabo

ANA G. MÉNDEZ SISTEMA UNIVERSITARIO UNIVERSITY SYSTEM
Bilingüe / Dual Language | TURABO UMET UNE AGM

◯ MOC ◯ CAC
◯ SFC ◯ DC
◯ TBC ◯ DAC

VERIFICATION WORKSHEET 2017 - 2018 (V1)

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/or your parents reported on your FAFSA. To verify that you and/or your parents 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, if a dependent student you and one of your parents, must complete and sign this worksheet, attach any required documents and submit the form and required attachments 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 at your school as soon as possible so that your financial aid will not be delayed.

Select one of the following two options based on the information included in your FAFSA.

☐ **Dependent** ☐ **Independent**

A. Student's Information

ID: ____________________

Last Name   First Name   M.I.   Social Security Number (SSN)   Date of Birth (MMDDYYYY)

Street Address (include apt. no.)   Email Address   Alternate Email Address

City   State   Zip Code   Home Phone Number   Cell Phone Number

B. Family Information: Number of Household Members and Number in College

If **DEPENDENT**, indicate your parent(s) marital status (check one) / If **INDEPENDENT**, indicate your marital status (check one):

◯ Single (never married) ◯ Married (includes remarried) ◯ Separated/Divorced ◯ Widowed ◯ Unmarried and both parents living together

If **DEPENDENT**, list in the table below the people in your parent's household. Include:

- Yourself and 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.

If **INDEPENDENT**, list in the table below the people in your household. Include:

- Yourself and your spouse, if you are married.
- Your or your spouse's children if you or your spouse will provide more than half of their support from July 1, 2017, through June 30, 2018, even if a child does not live with you.
- Other people if they now live with you and you or your spouse provides more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2018.

Also, include in the table below the name of the college for any household member, excluding your parent(s) if dependent, who is or 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 your name and student's ID at the top.*

Full Name	Age	Relationship	College	Will Be Enrolled at Least Half Time (Yes or No)
Example: Missy Jones	*18*	*Sister*	*Central University*	*Yes*
		Self		

Student's Name: ________________________________ ID: ____________________

C. Income Information

TAX RETURN FILERS Section

If **DEPENDENT**, the instructions below apply to each parent included in the household. Notify the financial aid administrator at your school if the parents filed separate IRS income tax returns for 2015 or had a change in marital status after December 31, 2015. Complete this section if the parents filed or will file a 2015 IRS income tax return(s).	If **INDEPENDENT**, the instructions below apply to you and your spouse, if married. Notify the financial aid administrator at your school if you or spouse filed separate IRS income tax returns for 2015 or had a change in marital status after December 31, 2015. Complete this section if you and spouse 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. In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. If the parent or student has not already used the tool, go to *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 or student is eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into the student's FAFSA.

Check the box that applies:

☐ The parents if dependent, or the student if independent have used the IRS DRT in *FAFSA on the Web* to retrieve and transfer 2015 IRS income tax return information into the student's FAFSA. *The student's school will use the IRS information that was transferred for the verification process*.

☐ The parents if dependent, or the student if independent have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to retrieve and transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed. *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 parents if dependent, or the student if independent are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript(s) –** not a photocopy of the income tax return. *To obtain an IRS Tax Return Transcript: (1) Online - go to www.IRS.gov, under the Tools heading on the IRS homepage, click "Get a tax transcript"; (2) Telephone request – call 1-800-908-9946; or (3) Paper request form – IRS Form 4506-T-EZ or IRS Form 4506-T.* Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

In most cases, for electronic tax return filers, 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of the 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2015 paper IRS income tax return has been received by the IRS. If you need more information about using the IRS Data Retrieval Tool or obtaining an IRS Tax Return Transcript, contact your financial aid administrator at your school.

If the parents for a dependent student, or if the student and spouse for an independent student 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 here if a 2015 IRS Tax Return Transcript is attached to this worksheet.

○ Check here if a 2015 IRS Tax Return Transcript will be provided later. *Verification cannot be completed until the IRS Tax Return Transcript has been submitted to the student's school.*

Student's Name: ___________________________________ ID: _____________________

If the information requested above could not be provided because of the unusual circumstances included below, select the circumstance that applies and provide the required documents, as applicable.

☐ **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 if the individual requested an additional extension of the filing time for tax year 2015;
- A 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 June 15, 2016; *and*
- A copy of IRS Form W–2 for each source of employment income received for tax year 2015 and, 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.

☐ **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; *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.

☐ **Individuals Who Filed Non-IRS Income Tax Returns –** An individual who filed or will file a 2015 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2015; or
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2015 income tax return(s).

NONTAX FILERS Section

If **DEPENDENT**, the instructions and certifications below apply to each parent included in the household in Section B. Complete this section if the parents will not file and are not required to file a 2015 income tax return with the IRS.	If **INDEPENDENT**, the instructions and certifications below apply to the student and spouse, if married. Complete this section if the student and spouse will not file and are not required to file a 2015 income tax return with the IRS.

Check the box that applies:

☐ Neither parent if dependent, or the student and spouse if independent were not employed and had no income earned from work in 2015.

☐ One or both parents if dependent, or the student and/or spouse if independent 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 provided. Attach copies of all 2015 IRS W-2 forms issued. List every employer even if they did not issue an IRS W-2 form. *If more space is needed, attach a separate page with your name and student's ID at the top.*

Employer's Name	2015 Amount Earned	IRS W-2 Attached?
Example: Suzy's Auto Body Shop	*$2,000.00*	*Yes*
TOTAL:	**$**	

Student's Name: ___________________________________ ID: ____________________

D. Additional Student information

Student	Item	Spouse/Parents
	Education credits (American Opportunity, Hope or Lifetime Learning tax credits).	
	IRA Deductions and Payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.	
	Tax exempt interest income.	
	Untaxed portions of IRA distributions.	
	Untaxed portions of pensions.	

E. Certification and Signature: Each person signing this worksheet certifies that all of the information reported on it is complete and correct. If dependent, 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, sent to prison, or both.**

_________________________ __________________ _________________________ __________________

Student's Signature Date Parent's Signature Date

Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school. Make a copy for your records.

FAO-V1 EU 17-18 Rev 2/2017