

2015-2016 Verification Worksheet

Dependent Student

University of South Alabama
Office of Financial Aid, 1200 Meisler Hall, Mobile, AL 36688

Your 2015–2016 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 USA 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: **USA Office of Financial Aid, 1200 Meisler Hall, Mobile, AL 36688.**

A. Dependent Student's Information

_____ Student's Last Name	_____ Student's First Name	_____ Student's M.I.	_____ Student's Social Security Number
_____ Student's Street Address (include apt. no.)			_____ Student's Date of Birth
_____ City	_____ State	_____ Zip Code	_____ Student's Email Address
_____ Student's Home Phone Number (include area code)			_____ Student's Alternate or Cell Phone Number

B. Dependent Student's Family Information

List below the people in your parents' household. Include:

- The student even if you do not live with your parents.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2015, through June 30, 2016, or if the other children would be required to provide parental information if they were completing a FAFSA for 2015–2016. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other people's support and will continue to provide more than half of their support through June 30, 2016.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time**

** For any household member, other than parents, who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2015, and June 30, 2016, include the full name of the college. If more space is needed, provide a separate page with the student's name and JAG Number at the top.

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student's Name: _____ SSN: _____ JAG#: _____

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS--

Instructions: Complete this section if the student filed or will file a 2014 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 2014 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2014 paper IRS income tax return has been received by the IRS.

Check the box that applies:

- ☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2014 IRS income tax return information into the student's FAFSA.
- ☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS income tax return has been filed.
- ☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2014 IRS Tax Return Transcript(s)**.

A **2014 IRS Tax Return Transcript** may be obtained through the:

- Online Request - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- IRS2Go App –
Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

☐ Check here if a **2014 IRS Tax Return Transcript(s)** is provided.

☐ Check here if a **2014 IRS Tax Return Transcript(s)** will be provided later.

2. TAX RETURN NON-FILERS—

Instructions: Complete this section if the student will not file and are not required to file a 2014 income tax return with the IRS.

Check the box that applies:

☐ The student was not employed and had no income earned from work in 2014.

☐ The student was employed in 2014 and have listed below the names of all employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is provided. Attach copies of all 2014 IRS W-2 forms issued to the student and spouse by their employers. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and JAG Number at the top.*

Employer's Name	Annual Amount Earned in 2014	IRS W-2 Provided?

Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS.

Student's Name: _____ SSN: _____ JAG#: _____

D. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—

Instructions: Complete this section if the parents filed or will file a 2014 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 2014 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2014 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

Check the box that applies:

- ☐ The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2014 IRS income tax return information into the student's FAFSA.
- ☐ The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS income tax return has been filed.
- ☐ The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2014 IRS Tax Return Transcript(s)**.

A **2014 IRS Tax Return Transcript** may be obtained through the:

- **Online Request** - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- **IRS2Go App** –
Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- **Telephone Request** - 1-800-908-9946
- **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

If the parents filed separate 2014 IRS income tax returns, **2014 IRS Tax Return Transcripts** must be provided for each.

- ☐ Check here if a **2014 IRS Tax Return Transcript(s)** is provided.
- ☐ Check here if a **2014 IRS Tax Return Transcript(s)** will be provided later.

Verification of 2014 IRS Income Tax Return Information for Individuals Granted a Filing Extension by the IRS:

If an individual is required to file a 2014 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- 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 2014;
- 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 2014; **and**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 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 2014.

Verification of 2014 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return:

If an individual filed an amended IRS income tax return for tax year 2014, provide both of the following:

- A signed copy of the original 2014 IRS income tax return that was filed with the IRS or a **2014 IRS Tax Return Transcript**; **and**
- A signed copy of the 2014 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Student's Name: _____ SSN: _____ JAG#: _____

2. TAX RETURN NONFILERS—

Instructions: The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2014 income tax return with the IRS.

Check the box that applies:

- ☐ Neither parent was employed, and neither had income earned from work in 2014.
- ☐ One or both parents were employed in 2014 and have listed below the names of all employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is provided. Attach copies of all 2014 IRS W-2 forms issued to the parent(s) by their employer(s). *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and JAG Number at the top.*

Employer's Name	Annual Amount Earned in 2014	IRS W-2 Provided?

Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS.

E. Parent's Other Information to Be Verified

1. Complete this section if someone in the student's parent's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2013 or 2014 calendar years.

☐ One of the persons listed in Section B of this worksheet received SNAP benefits in 2013 or 2014. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2013 and/or 2014.

2. Complete this section if your parent or step-parent, if married, **paid child support in 2014**.

☐ Your parent or step-parent, who is a member of the student's household, **paid child support in 2014**. List below:

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name & Age of Child for Whom Support Was Paid	Amount of Child Support Paid in 2014

F. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA 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

******Typed or computer generated signatures will not be accepted******