



2015- 2016 Financial Aid Verification Worksheet

Dependent Student *

Independent Student *

To determine your status, read page 4.

La Verne ID #: _____

Your 2015-2016 Free Application for Federal Student Aid (FAFSA) was selected for a process called "Verification". The law says that before awarding Federal Student Aid, University of La Verne must compare your FAFSA with the information on this worksheet and other required documents. **We cannot process your financial aid until you submit all the required verification documents. Failure to complete the verification process in a timely matter may result in the loss of aid.**

SECTION 1: STUDENT INFORMATION

_____		_____	_____
Last Name	First Name	Social Security Number	
_____			_____
Street Address (include apt. no.)			Date of Birth
_____	_____	_____	_____
City	State	Zip Code	Email Address
_____		_____	
Cell Phone #	Home/Alternate Phone #		

SECTION 2: STUDENT'S TAX AND INCOME INFORMATION (check one)

- I, the student, **will not file and are not required to file** a 2014 income tax return with the IRS. *(We may later request documentation from the IRS that indicates a 2014 IRS income tax return was not filed.)*
- I, the student, have used the **IRS Data Retrieval Tool** on FAFSA on the Web to transfer my 2014 IRS income tax information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. For further instructions read page 4.
- I, the student, have attached my **2014 IRS Tax Return Transcript (TRT)** to this worksheet. **DO NOT SUBMIT YOUR 2014 FEDERAL INCOME TAX RETURN (1040, 1040A and 1040 EZ).** For directions on how to request a TRT read page 4.
- I, the student, filed or will file **an amended 2014 IRS tax return.** You must submit: 1) a **signed** copy of the original 2014 tax return filed with the IRS or a 2014 IRS Tax Return Transcript, **and** 2) a **signed** copy of the 2014 IRS Amended Tax Return Form (i.e. 1040X form) that was filed with the IRS.
- My spouse and I did not file taxes together. Therefore I am submitting IRS Tax Return Transcripts for both my spouse and I.

SECTION 3: PARENT(S) OR MARRIED STUDENT'S SPOUSAL TAX AND INCOME

Dependent students: If your parent(s) (including step-parent) are married or your biological parents are not married but live together, check the appropriate box or boxes below for both parents.

- We (I) **will not file and are not required to file** a 2014 income tax return with the IRS. *(We may later request documentation from the IRS that indicates a 2014 IRS income tax return was not filed.)*
- We (I) have used the **IRS Data Retrieval Tool** on FAFSA on the Web to transfer our (my) 2014 IRS income tax information into the FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. For further instructions read page 4.
- We (I) have attached our (my) **2014 IRS Tax Return Transcript (TRT)** to this worksheet. **DO NOT SUBMIT YOUR 2014 FEDERAL INCOME TAX RETURN (1040, 1040A and 1040 EZ).** For directions on how to request a TRT read page 4.
- We (I) filed or will file **an amended 2014 IRS tax return.** You must submit: 1) a **signed** copy of the original 2014 tax return filed with the IRS or a 2014 IRS Tax Return Transcript, **and** 2) a **signed** copy of the 2014 IRS Amended Tax Return Form (i.e. 1040X form) that was filed with the IRS.
- My parents or my spouse and I did not file taxes together. Therefore I am submitting an IRS Tax Return Transcript for each parent or for both my spouse and I.

MAILING ADDRESS

UNIVERSITY OF LA VERNE · OFFICE OF FINANCIAL AID · 1950 THIRD STREET · LA VERNE, CA · 91750
Phone (800) 649-0160 · Fax (909) 392-2751 · Email: finaid@laverne.edu



Dependent Student
 Independent Student

La Verne ID#: _____

SECTION 4: FAMILY INFORMATION

STEP 2A: In the box below provide the following:

DEPENDENT: List yourself, your parent(s) (including step-parent) and their children, even if they do not live with your parent(s) but will receive more than half of their support from them between July 1, 2015 and June 30, 2016, and other people who live with them and will receive more than half of their support from them between July 1, 2015 and June 30, 2016. **DO NOT INCLUDE YOUR NON-CUSTODIAL PARENT.**

INDEPENDENT: List yourself, your spouse (if applicable) and your children, even if they do not live with you but will receive more than half of their support from you (and/or your spouse) between July 1, 2015 and June 30, 2016, and other people who live with you and will receive more than half of their support from you (and/or your spouse) between July 1, 2015 and June 30, 2016.

STEP 2B: In the box below provide the following:

After completing Step 2A above, list the college in step 2B (excluding parents/step-parent) for all household members who will be enrolled in school at least half-time between July 1, 2015 and June 30, 2016 and will be enrolled in a degree/certificate program.

STEP 2A			STEP 2B
Full Name	Age	Relationship	College (if applicable) ***Must be enrolled at least half time***
		<i>Self</i>	<i>University of La Verne</i>

SECTION 5: STUDENT NON-TAX FILER SECTION

Check the boxes that applies and provide the required documentation. Please visit our website to download the required forms listed below under the 2015-2016 Financial Aid Documents at <http://sites.laverne.edu/financial-aid/>.

- I will not file and I am not required to file a 2014 Federal Income Tax Return **AND**
- I have attached a Non-Tax Filer Worksheet **AND**
- I have attached a Student (Spouse) Expense and Resource Worksheet (*independent students only*) **AND**
- I worked in 2014 but was not required to file taxes and have attached copies of all my 2014 W-2 Form(s):

Name of Employer(s) in 2014	Amount Earned in 2014	W-2 Attached? Yes/No (why?)



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SECTION 6: PARENT(S) OR SPOUSE NON-TAX FILER SECTION

Check the boxes that applies and provide the required documentation. Please visit our website to download the required forms listed below under the 2015-2016 Financial Aid Documents at http://sites.laverne.edu/financial-aid/.

- We (I) will not file and are not required to file a 2014 Federal Income Tax Return AND we (I)
have attached a Non-Tax Filer Worksheet AND
have attached a Parent(s) Expense and Resource Worksheet or Student (Spouse) Expense and Resource Worksheet AND
have attached copies of all my 2014 W-2 Form(s) (if employed during 2014)

Table with 4 columns: Full Name, Name of Employer(s) in 2014, Amount Earned in 2014, W-2 Attached? Yes/No (why?)

SECTION 7: PRINT AND SIGN THE WORKSHEET

If dependent, at least one parent who is listed on the FAFSA must sign this form. By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If I (we) indicated a non-tax filer status (i.e. not required to file or will not file) I (we) certify that I (we) are not required to file a federal income tax return for the 2014 year. Per Department of Education guidelines, I (we) understand that purposely giving false or misleading information on the FAFSA or this worksheet may result in loss of aid and additional penalties including fines, imprisonment, or both.

Student's Physical Signature Date

Parent Physical Signature (Dependent Students Only) Date

Please review the checklist on page 4 before submitting your verification documents to our office. You can submit the documentation via fax, email, mail or in person.



2015- 2016 VERIFICATION CHECKLIST

- Did you indicate at the top of each page if you are a Dependent or an Independent student? To determine your status please visit the FAFSA website at <https://studentaid.ed.gov/fafsa/filling-out/dependency>.
- Is the 2015-2016 Verification Form completely filled out and signed by the student, and if applicable, the parent?
- Did you write your La Verne ID number on each verification page?
- If you filed or are required to file taxes in 2014, did you provide your tax information to our office by utilizing the IRS Data Retrieval on your FAFSA or by submitting a copy of your 2014 IRS Tax Return Transcript?
- If you did not file taxes, did you complete and attach the Non-Tax Filer Worksheet, Student (Spouse) and/or Parent(s) Expense and Resource Worksheet and 2014 W-2 forms (if applicable)?

PLEASE NOTE:

1. The IRS Data Retrieval Tool is part of FAFSA on the Web and is the easiest way to submit your, your spouse's and/or your parents' tax information to our office. You must wait two weeks from the electronic filing date of your taxes to use the IRS Data Retrieval Tool on your FAFSA.

Instructions on how to use the IRS Data retrieval is as follows:

1. Log into your FAFSA record at www.fafsa.ed.gov.
 2. Open your saved "2015-2016 FAFSA" and select "Make FAFSA Corrections."
 3. Navigate to the Financial Information section of the form.
 4. Under the "Student Tax Information" and/or the "Parent Tax Information," select that you have "Already Completed" the 2014 IRS income tax return.
 5. From there, follow the instructions to determine if you are **eligible** to use the IRS Data Retrieval Tool to transfer your, your spouse's and/or your parents' 2014 IRS income tax information into your FAFSA.
 6. Follow the instructions on how to load your, your spouse's and/or your parents' income information from the IRS back onto your FAFSA.
 7. Sign and submit your FAFSA. If you are a dependent student, your parent will also need to electronically sign your FAFSA.
2. If you **are not eligible** or do not choose to use the IRS Data Retrieval Tool, you must provide a **COPY** of your, your spouse's and /or your parents' 2014 IRS Tax Transcript. **This transcript can only be generated by the IRS.**

To obtain a **FREE IRS Tax Return Transcript**, go to www.irs.gov and click on the "Get Transcript of Your Tax Records" link. Make sure to request the **IRS Tax Return Transcript** and **NOT** the Account Transcript. If you and your spouse or parents filed a separate 2014 tax return, you must submit a tax return transcript for **BOTH** you and your spouse, or both parents.

3. If you filed a tax extension with the IRS, you must complete the 2015-2016 IRS Extension Worksheet located at <http://sites.laverne.edu/financial-aid/>.
4. You can check the status of your financial aid by logging into your "MyLaVerne" account at https://banweb-1.laverne.edu/prod/twbkwbis.P_WWWLogin.

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