



## 2015-16 Verification Worksheet – Independent Student Institutional Documentation Service (IDOC)

### Step 1 – Student Information

|                                  |            |             |  |
|----------------------------------|------------|-------------|--|
| Last name                        | First name | Middle name | Social Security Number                             |
| Address (include apt. no.)       |            |             | Date of birth                                      |
| City                             | State      | Zip Code    | Student's primary phone number (include area code) |
| Student's primary e-mail address |            |             | Alternate contact (phone number or e-mail address) |

### Step 2 – Household Information

In the chart below include:

- Yourself
- Your spouse (if you are married)
- Your children if you will provide more than half of their support from July 1, 2015 through June 30, 2016
- Other people only if they live with you and you provide more than half of their support and will continue to do so from July 1, 2015 through June 30, 2016
  - Provide college information for those students attending at least half-time during 2015-16 in a program leading to a degree, diploma, or certificate

| Full Name | Age | Relationship | Name of College | Undergraduate/<br>Graduate | Half-time/<br>Full-time | Expected<br>Grad Date |
|-----------|-----|--------------|-----------------|----------------------------|-------------------------|-----------------------|
|           |     | <i>Self</i>  |                 |                            |                         |                       |
|           |     |              |                 |                            |                         |                       |
|           |     |              |                 |                            |                         |                       |
|           |     |              |                 |                            |                         |                       |
|           |     |              |                 |                            |                         |                       |
|           |     |              |                 |                            |                         |                       |
|           |     |              |                 |                            |                         |                       |
|           |     |              |                 |                            |                         |                       |

*Relationship options: student, student's spouse, student's child, parent/step-parent, brother/sister, grandparent, other.*

### Step 3 – Household Untaxed Income - Calendar Year 2014

Did you or others in your household receive untaxed income in 2014?

\_\_\_\_\_ **YES**      Complete the Untaxed Income section starting at page 3. Continue to Step 4.

\_\_\_\_\_ **NO**      Continue to Step 4.

#### Step 4 – Student's Tax Filing Status – Calendar Year 2014

Have you or will you be required to file a 2014 U.S. federal income tax return?

\_\_\_\_\_ **YES** Continue to Step 5.

\_\_\_\_\_ **NO, but I had some earnings from work** Complete, and submit in your IDOC packet, a *Non-Tax Filer's Statement* available on the IDOC website. Be sure to include all W-2 and 1099 forms you received. Continue to Step 5.

\_\_\_\_\_ **NO, and I had no earnings from work** Continue to Step 5.

#### Step 5 – Spouse's Tax Filing Status – Calendar Year 2014

If you are married, has your spouse filed or will he or she be required to file a 2014 U.S. federal income tax return?

\_\_\_\_\_ **YES** Continue to Step 6.

\_\_\_\_\_ **NO, but he or she had some earnings from work** Complete, and submit in your IDOC packet, a *Non-Tax Filer's Statement* available on the IDOC website. Be sure to include all W-2 and 1099 forms he or she received. Continue to Step 6.

\_\_\_\_\_ **NO, and he or she had no earnings from work** Continue to Step 6.

#### Step 6 – Food Stamp Benefits – Calendar Years 2013 and 2014

Did you receive Supplemental Nutrition Assistance Program (SNAP) benefits (Food Stamps) in 2013 or 2014?

\_\_\_\_\_ **YES** Submit in your IDOC packet a copy of a letter or other documentation from the agency that issued the Food Stamps your family received. If your college has given you guidance, please follow their directions. Clearly label the document "Food Stamp Verification" and put your SSN in the top right corner of the document. Continue to Step 7.

\_\_\_\_\_ **NO** Continue to Step 7.

#### Step 7 – Child Support Paid – Calendar Year 2014

Did you, or your spouse if married, pay child support because of divorce or separation during the calendar year 2014? (Do not include support for children included in Step 2 above.)

\_\_\_\_\_ **YES** Complete, and submit in your IDOC packet, a *Child Support Paid Verification Statement* available on the IDOC website. Continue to Step 8.

\_\_\_\_\_ **NO** Continue to Step 8.

#### Step 8 – Certification

By signing this worksheet, I certify all the information reported is complete and correct (the student and student's spouse, if married, must sign):

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Student Signature

Date

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Spouse Signature (if married)

Date

Mail this completed form along with other required documents listed in your IDOC Requirements Letter to the **College Board IDOC, P.O. Box 4017, Mount Vernon, IL 62864**. You must also include a completed IDOC Cover Sheet. To view your Requirements or to print a Cover Sheet, go to <https://idoc.collegeboard.com>. Call 305-420-3688 for assistance.

## Verification of Student's Untaxed Income for 2014

**Only complete and return this section if you answered "Yes" in Step 3.**

**Enter annual amounts for applicable items.** If any item does not apply, enter "N/A" for Not Applicable where a **response** is requested and 0 in an area where an **amount** is requested.

If more space is needed, provide a separate page with the student's name and IDOC ID at the top.

### A. Payments to tax-deferred pension and retirement savings

List payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.

| Name of Person Who Made the Payment | Total Amount Paid in 2014 |
|-------------------------------------|---------------------------|
|                                     |                           |
|                                     |                           |
|                                     |                           |
|                                     |                           |
|                                     |                           |

### B. Child support received

List the actual amount of child support **received** in 2014 for the children in your household.

**Do not include** foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

| Name of Adult Who Received the Support | Name of Child For Whom Support Was Received | Amount of Child Support Received in 2014 |
|--|---|--|
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |

### C. Housing, food, and other living allowances paid to members of the military, clergy, and others

Include cash payments and/or the cash value of benefits received.

**Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

| Name of Recipient | Type of Benefit Received | Amount of Benefit Received in 2014 |
|-------------------|--------------------------|------------------------------------|
|                   |                          |                                    |
|                   |                          |                                    |
|                   |                          |                                    |

## Verification of Student's Untaxed Income for 2014

### D. Veterans non-education benefits

List the total amount of veterans non-education benefits received in 2014. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

**Do not include** federal veteran's educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill

| Name of Recipient | Type of Veterans Non-education Benefit | Amount of Benefit Received in 2014 |
|-------------------|--|------------------------------------|
|                   |  |                                    |
|                   |  |                                    |
|                   |  |                                    |

### E. Other untaxed income

List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

**Do not include** any items reported or excluded in A – D above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

| Name of Recipient | Type of Other Untaxed Income | Amount of Other Untaxed Income Received in 2014 |
|-------------------|------------------------------|---|
|                   |                              |   |
|                   |                              |   |
|                   |                              |   |

### F. Money received by or paid on the student's behalf

List any money received by or paid on the student's behalf (e.g., if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc.) not reported elsewhere on this form. Enter the total amount of cash support the student received in 2014. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone **other than the student or the student's parents**, such as grandparents, aunts, and uncles.

| Purpose: e.g., Cash, Rent, Books | Source | Amount Received in 2014 |
|----------------------------------|--------|-------------------------|
|                                  |        |                         |
|                                  |        |                         |
|                                  |        |                         |
|                                  |        |                         |
|                                  |        |                         |
|                                  |        |                         |