2018–2019 Dependent Verification Worksheet

Your 2018–2019 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.

| Student's Last Name | Student's First Name | Student's M.I. | Student's ID Number (A00xxxxxx) |
|---|----------------------|-------------------------|--|
| Student's Street Address (in | clude 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

Dependent Student's Information:

Number of Household Members: List below ALL of the people in the parents' household. Include:

- The student.
- 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, 2018, through June 30, 2019, or if the other children would be required to provide parental information if they were completing a FAFSA for 2018–2019. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide 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, 2019.

Number in College: Include in the space below information about any household member who is, or will be, enrolled <u>at least half time</u> in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2018, and June 30, 2019, include the name of the college.

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

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|---------|---|
| | | Self | | |
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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.

C. Dependent Student's Income Information to Be Verified

Important Note: The instructions below apply to the student. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Instructions: Complete this section if the student <u>filed or will file</u> a 2016 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 <u>FAFSA.gov</u>. In most cases, no further documentation is needed to verify 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.*

| Check the box that app | olies: |
|------------------------|--------|
|------------------------|--------|

| The student <u>has used</u> the IRS DRT in FAFSA on the Web to transfer 2016 IRS income tax return information into the student's |
|--|
| FAFSA. |
| The student <u>has not yet used</u> the IRS DRT in <i>FAFSA on the Web</i> , but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA once the 2016 IRS income tax return has been filed. |
| The student is <u>unable or chooses not to use</u> the IRS DRT in FAFSA on the Web, and instead will provide the school with a 2016 |
| IRS Tax Return Transcript(s). |
| A 2016 IRS Tax Return Transcript may be obtained through: |
| |

- Get Transcript Online Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Get Transcript by Mail Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request 1-800-908-9946
- Paper Request Form IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2016 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.

| If the student and spouse filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the 2016 IRS Tax Return |
|--|
| Transcript(s) must be provided for each. |
| |

| Check here if a | ı 2016 IRS | S Tax Retur | rn Transcript(s) is provided. | |
|---------------------|------------|-------------|-----------------------------------|-------|
| Check here if a | 2016 IRS | S Tax Retur | rn Transcript(s) will be provided | latei |

2. TAX RETURN NONFILERS— Complete this section if you the student did not file and <u>are not required</u> to file a 2016 income tax return with the IRS.

Check the box that applies:

| Student was not employed and had no income earned from work in 2016. |
|---|
| Student was employed in 2016 and have listed below the names of all employers, the amount earned from each employer in 2016 |
| and whether an IRS W-2 form is provided. [Provide copies of all 2016 IRS W-2 forms issued to the parents 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 ID number at the top.

| Employer's Name | IRS W-2 | Annual Amount Earned in |
|---|-----------|-------------------------|
| | Provided? | 2016 |
| (Example) ABC's Auto Body Shop | Yes | \$4,500.00 |
| | | |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

| Check here if confirmation | of non-filing | is provided. |
|--------------------------------|---------------|-------------------------|
| Check here if confirmation | of non-filing | will be provided later. |

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—**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Instructions: Complete this section if the parents <u>filed or will file</u> a 2016 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 <u>FAFSA.gov</u>. In most cases, no further documentation is needed to verify 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.*

| Chec | k the box that applies: |
|------|---|
| | The parents <u>have used</u> the IRS DRT in <i>FAFSA on the Web</i> to transfer 2016 IRS income tax return information into the student's FAFSA. |
| | The parents <u>have not yet used</u> the IRS DRT in <i>FAFSA on the Web</i> , but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA once the 2016 IRS income tax return has been filed. |
| | The parents are <u>unable or choose not to use</u> the IRS DRT in <i>FAFSA on the Web</i> , and instead will provide the school with a 2016 IRS Tax Return Transcript(s) . |
| | A 2016 IRS Tax Return Transcript may be obtained through: |
| | • Get Transcript Online - Go to www.irs.gov , under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication. |
| | • Get Transcript by Mail - Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request. |
| | <u>Automated Telephone Request</u> - 1-800-908-9946 |
| | Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T |
| | In most cases, for electronic tax return filers, 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2016 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. |
| | If the parents filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the 2016 IRS Tax Return Transcript(s) must be provided for each. |
| | Check here if a 2016 IRS Tax Return Transcript(s) is provided Check here if a 2016 IRS Tax Return Transcript(s) will be provided later. |
| | X RETURN NONFILERS— Complete this section if the parents will not file and <u>are not required</u> to file a 2016 income tax return the IRS. |
| Chec | k the box that applies: |
| | Neither parent was employed, and neither had income earned from work in 2016. |
| | One or both parents were employed in 2016 and have listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. [Provide copies of all 2016 IRS W-2 forms issued to the parents 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 ID number at the top. |
| Г | Employee's Name IDS W 2 Annual Amount Found |

| | | • |
|--|-----------|----------------------|
| Employer's Name | IRS W-2 | Annual Amount Earned |
| | Provided? | in 2016 |
| (Example) ABC's Auto Body Shop | Yes | \$4,500.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From World | k | \$ |

| Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income ta | x return was n | ot filed with the |
|--|----------------|-------------------|
| IRS or other relevant tax authority. | | |

| Check here if confirmation | of non-filing is provided. |
|--------------------------------|---------------------------------------|
| Check here if confirmation | of non-filing will be provided later. |

Verification of Other Untaxed Income for 2016

If any item does not apply, enter "N/A" for Not Applicable where a <u>response</u> is requested, or enter 0 (zero) in an area where an <u>amount</u> is requested.

If the student was required to provide parental information on the FAFSA, answer each question below as it applies to the student and the student's parent(s) whose information is on the FAFSA.

If the student was not required to provide parental information on the FAFSA, answer each question below as it applies to the student (and the student's spouse, if married).

2016 IRS W-2 forms: Provide copies of all 2016 IRS W-2 forms issued by the employers to the dependent student and the student's parents or to the independent student and spouse, if the student is married.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2016, multiply that amount by the number of months in 2016 you paid or received that amount. If you did not pay or receive the same amount each month in 2016, add together the amounts you paid or received each month during 2016.

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

E. Payments to tax-deferred pension and retirement savings

List any 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 | Annual Amount Paid in 2016 |
|---|----------------------------------|
| | |
| | |
| | |
| Total Payments to Tax-deferred Pension and Retirement Savings | \$ |

F. Additional information:

Provide information about any other resources, benefits, and other amounts received by the student and any members of the student's household. This may include items that were not required to be reported on the FAFSA or other forms submitted to the financial aid office, and includes such things as federal veterans' education benefits, military housing, SNAP, TANF, etc.

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

| Type of Financial Support | Annual Amount of Financial Support Received in 2016 |
|--|---|
| I maneiai support | Support Received in 2010 |
| | |
| | |
| | |
| | |
| Total Amount of Financial Support Received | |
| | Financial Support |

| Total Amount of Financial Support Received | | | \$ | | |
|--|--|-----|--|--|--|
| Comments: | | | | | |
| | | | | | |
| | | | | | |
| Certifications a | nd Signatures | | | | |
| information reporte The student and or | ng below certifies that all of the discomplete and correct. The parent whose information was FSA must sign and date. | | RNING: If you purposely give false or misleading rmation, you may be fined, sent to prison, or both. | | |
| | | | | | |
| Print Student's Nar | me Student's ID Num | ber | Return forms to: | | |
| Student's Signature | e Date | | Taft College Financial Aid Department 29 Cougar Court Taft CA 93268 Fax: (661) 763-7758 | | |
| Parent's Signature | Date | | | | |