

# 2014-2015 Verification Worksheet

## Dependent Student- Tracking Group V5

Your 2014-2015 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.

### A. Dependent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's SSN
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) Number			Student's Alternate or Cell Phone Number

### B. Dependent Student's Family Information

List 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, 2014, through June 30, 2015, or if the other children would be required to provide parental information if they were completing a FAFSA for 2014-2015. 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, 2015.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, **at least half time** in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2014, and June 30, 2015. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
<i>(Student)</i>		<i>SELF</i>	<i>Bacone College</i>	

### C. Dependent Student's Income Information to Be Verified

#### 1. TAX RETURN FILERS

Important Note: If the student filed, or will file, an amended 2013 IRS tax return, the student must contact the financial aid administrator before completing this section.

**Instructions:** Complete this section if the student, filed or will file a 2013 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to [FAFSA.gov](http://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 student is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

- The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2013 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2013 IRS income information into the student's FAFSA once the student has filed a 2013 IRS tax return. *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 student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2013 IRS tax return transcript**—not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1/800/908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
  - Check here if the student's IRS tax return transcript is attached to this worksheet.
  - Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

#### 2. TAX RETURN NONFILERS

Complete this section if the student will not file and is not required to file a 2013 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2013.
- The student was employed in 2013 and has listed below the names of all the student's employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is attached. Attach copies of all 2013 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2013 Amount Earned	IRS W-2 Attached?
ABC Shipping (example)	\$1,280	Yes

**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:** If the student’s parent(s), filed or will file, an amended 2013 IRS tax return the student’s financial aid administrator must be contacted before completing this section.

**Instructions:** Complete this section if the student’s parent(s) filed or will file a 2013 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student’s parent(s) has not already used the tool, the parent and the student should go to [FAFSA.gov](http://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(s) is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student’s FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student’s financial aid administrator.*

**Check the box that applies:**

The student’s parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2013 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student’s school will use the IRS information transferred into the student’s FAFSA to complete the verification process.*

The student’s parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2013 IRS income information into the student’s FAFSA once the parent’s IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student’s financial aid administrator cannot complete verification until the parent has transferred IRS information into the student’s FAFSA.*

The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student’s school a copy of the parent’s **2013 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript go to [www.irs.gov](http://www.irs.gov) and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946. Make sure you order the “IRS tax return transcript” and not the “IRS tax account transcript.” The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2013 tax returns were filed, 2013 IRS tax return transcripts must be submitted for each parent.*

Check here if an IRS tax return transcript(s) is attached to this worksheet.

Check here if IRS tax return transcript(s) will be submitted to the student’s school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

**2. TAX RETURN NONFILERS**

Complete this section if the student’s parent(s) will not file and is not required to file a 2013 income tax return with the IRS.

**Check the box that applies:**

The parent(s) was not employed and had no income earned from work in 2013.

The parent(s) was employed in 2013 and has listed below the names of all the parent’s employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is attached. Attach copies of all 2013 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student’s name and Social Security Number at the top.*

Employer’s Name	2013 Amount Earned	For Whom?	IRS W-2 Attached?
Pro Auto	\$980	Father	Yes

**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 2012 or 2013 calendar years.

One of the persons listed in Section B of this worksheet received SNAP benefits in 2012 or 2013. If asked by the student’s school, I will provide documentation of the receipt of SNAP benefits during 2012 and/or 2013.

2. Complete this section if one of the student’s parents paid child support in 2013.

One (or both) of the student’s parents listed in Section B of this worksheet paid child support in 2013. The parent has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2013 for each child. If asked by the school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes the student’s name and Social Security Number at the top.*

Name of Person Who Paid	Name of Person to Whom	Name of Child for Whom Support	Amount of Child Support
Joe Jones	Jane Doe	Jake Jones	\$6,000

**F. High School Completion Status**

You must submit documentation of high school completion or GED equivalent along with this worksheet. **Check the box of the document you will attach to this worksheet:**

- High school diploma or copy of final, official high school transcript that indicates when the diploma was awarded
- Copy of General Education Development (GED) Certificate.
- Post-secondary transcript of a successfully completed two-year program acceptable for full credit toward a bachelor’s degree
- If you are a homeschooled student, a transcript or equivalent, signed by parent or guardian, listing secondary school courses you have completed and documentation that you have successfully completed secondary school education.
- If you are a homeschooled student, a secondary school completion credential provided under State law.

**G. Documentation of Identity/Statement of Educational Purpose**

In order to complete the Verification process, you will need to appear in person at your post-secondary institution and present your government issued ID (such as a driver’s license, military ID, passport, etc.) and this verification worksheet to an institutionally authorized financial aid administrator. Your financial aid administrator will need to validate the statement below at the time of submission by maintaining a copy of your photo ID and by providing a signature and date. ***If you cannot appear in person to submit this worksheet, you will need to provide a copy of your government issued ID and this worksheet notarized by a public notary.***

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the federal  
 (Print Student’s Name)  
 student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending

\_\_\_\_\_ for 2014-2015.  
 (Name of Postsecondary Educational Institution)

Student’s Signature and Date

Financial Aid Administrator Signature and Date

**Notary's Certificate of Knowledge**

State of: \_\_\_\_\_ City/County of: \_\_\_\_\_ on: \_\_\_\_\_

Before me, \_\_\_\_\_ personally appeared, \_\_\_\_\_  
(Notary's Name) (Printed name of signer)

And provided to me on a basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of government-issued photo ID provided)

To the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal** \_\_\_\_\_

\_\_\_\_\_  
(Notary Signature)

\_\_\_\_\_  
(Date Commission Expires)

(Seal)

**H. Certification and Signatures**

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. **The student and one parent must sign and date.**

\_\_\_\_\_  
Student's Signature Date

\_\_\_\_\_  
Parent's Signature Date

This completed worksheet (**along with photocopies of any required documents**) must be ***mailed, or brought*** into the office as soon as possible to:

Bacone College Office of Financial Aid  
2299 Old Bacone Road  
Muskogee, OK 74403  
TOLL FREE: 888.682.5514

***This worksheet will not be accepted by fax as we are required to have the ORIGINAL Notary signature and seal.***

***You should make a copy of this worksheet for your records.***