

2017-2018 Verification Worksheet

Independent Student

Your 2017-2018 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 reported on your FAFSA. To verify that you provided correct information we 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 must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the Student Administrative Services Office in the Conlan Center. If you have any questions about verification, please contact our office as soon as possible so that your financial aid will not be delayed. Our phone number is 513-244-4418.

A. Independent Student's Information

 Student's Last Name Student's First Name Student's M.I. Student's Social Security Number or ID 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
 (include area code)

B. Independent Student's Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children or spouse's children if you or your spouse will provide more than half of their support from July 1, 2017, through June 30, 2018, even if they do not live with you.
- Other people if they now live with you and you or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.

Include the name of the college for any household member 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, 2017, and June 30, 2018. *If more space is needed, attach 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)
		<i>Self</i>	<i>Mount St. Joseph University</i>	<i>Yes</i>

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

C. Independent Student’s Income Information to Be Verified

1. **TAX RETURN FILERS—Important Notes:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2015, had a change in marital status after December 31, 2015, filed or will file an amended IRS tax return, a non-IRS tax return, are granted a filing extension, or are victims of IRS tax-related identity theft for the tax year 2015.

Instructions: Complete this section if the student and spouse filed or will file a 2015 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 2015 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 applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2015 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 2015 IRS income tax return information into the student’s FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript(s)**.

A **2015 IRS Tax Return Transcript** may be obtained through the:

- 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.”
- Get Transcript ONLINE – Go to www.irs.gov, under 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.”
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

If you and your spouse filed separate 2015 IRS income tax returns, the IRS DRT cannot be used and the **2015 IRS Tax Return Transcripts** must be provided for both.

- ___ Check here if a **2015 IRS Tax Return Transcript(s)** is provided.
- ___ Check here if a **2015 IRS Tax Return Transcript(s)** was provided as part of the 2016-2017 verification process.
- ___ Check here if a **2015 IRS Tax Return Transcript(s)** will be provided later. Estimated date of arrival: _____

2. **TAX RETURN NON-FILERS**—The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2015 income tax return with the IRS.

Check the box that applies and provide confirmation of non-filing (see below*):

- The student and spouse were not employed and had no income earned from work in 2015.
- The student and/or spouse were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. **[Provide copies of all 2015 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 ID number at the top.*

Employer’s Name	2015 Annual Amount Earned	IRS W-2 Provided?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
Total Amount of Income Earned From Work	\$	

***Provide documentation** from the IRS or other relevant tax authority dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority. This can be obtained by submitting IRS Form 4506-T and checking box 7.

- ___ Check here if confirmation of non-filing is provided.
- ___ Check here if confirmation of non-filing will be provided later. Estimated date of arrival: _____

D. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student's Signature (Required)

Date

Spouse's Signature (Optional)

Date

Do not mail this worksheet to the U.S. Department of Education.

***Submit this worksheet to:
Student Administrative Services
Mount St. Joseph University
5701 Delhi Road
Cincinnati, OH 45233***

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