

Troy University
 Financial Aid Office
 134 Adams Administration Bldg.
 Troy, AL 36082

**Dependent
 Verification Worksheet (V5)
 2015-2016
 Call 1-800-414-5756 for questions**



Your 2015-2016 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 provide correct information, we will compare your FAFSA with the information on this institutional verification document 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 financial aid office at Troy University. The financial aid office may ask for additional information. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed. You must return this form to the address listed on this form.

A. Student Information

Student's Name: _____ Social Security Number: _____
First M.I. Last

Date of Birth: _____ Home Phone: _____ Cell Phone: _____

Email: _____ Work Phone: _____

Address: _____
Street/P.O. Box City State Zip

B. Family Information

List below 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 their support from July 1, 2015, through June 30, 2016, or if the other children would be required to provide parental information if they were completing a FAFSA for 2015-2016. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2016.

For any household member, excluding the parents, who 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, 2015, and June 30, 2016, include the name of the college. If more space is needed, provide a separate page with the student's name and social security number at the top.

Full Name	Age	Relationship	College
You, the student			Troy University

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. Verification of 2014 IRS Income Tax Return Information for Student Tax Filers

Instructions: Complete this section if the student filed or will file a 2014 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 2014 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2014 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.

Check the box that applies:

The student has used the IRS DRT in *FAFSA on the Web* to transfer 2014 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 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS income tax return has been filed.

The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2014 IRS Tax Return Transcript(s), W-2 Forms, and other IRS documents.** (signature not required)

A 2014 IRS Tax Return Transcript may be obtained through the:

- Online Request - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- IRS2Go App – Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

Check here if a **2014 IRS Tax Return Transcript(s)** is provided.

Check here if a **2014 IRS Tax Return Transcript(s)** will be provided later.

Verification of 2014 Income Information for Student Nontax Filers

Complete this section if the student will not file and is not required to file a 2014 income tax return with the IRS.

Check the box that applies:

The student was not employed and had no income earned from work in 2014.

The student was employed in 2014 and have listed below the names of all employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is provided. [Provide copies of all 2014 IRS W-2 forms issued to the student 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 social security number at the top.

Employer's Name	2014 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

D. Verification of 2014 IRS Income Tax Return Information for Parent Tax 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 2014 or had a change in marital status after the end of the 2014 tax year on December 31, 2014.

Instructions: Complete this section if the parents filed or will file a 2014 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](http://fafsa.gov).* In most cases, no further documentation is needed to verify 2014 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic filers, 2014 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT within 8–11 weeks after the 2014 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.

Check the box that applies:

The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2014 IRS income tax return information into the student's FAFSA.

The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS income tax return has been filed.

The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2014 IRS Tax Return Transcript(s), W-2 Forms, and other IRS documents**. (signature not required)

A 2014 IRS Tax Return Transcript may be obtained through the:

- Online Request - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- IRS2Go App – Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

If the parents filed separate 2014 IRS income tax returns, **2014 IRS Tax Return Transcripts** must be provided for both.

____ Check here if a **2014 IRS Tax Return Transcript(s)** is provided.

____ Check here if a **2014 IRS Tax Return Transcript(s)** will be provided later.

Verification of 2014 Income Information for Parent Nontax Filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2014 income tax return with the IRS. You must complete a 2015-2016 Living Expense Statement form. It can be located at <http://trojan.troy.edu/financialaid> under **2015-2016 Forms**.

Check the box that applies:

One parent was not employed and had no income earned from work in 2014.

Neither parent was employed and had no income earned from work in 2014.

One or both parents were employed in 2014 and have listed below the names of all employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is provided. [Provide copies of all 2014 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 social security number at the top.

Employer's Name	2014 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

Student's Name _____ SSN: _____

Instructions: Please complete all the fields below. If any field is left blank, we will consider the form incomplete, we will **NOT** assume 0.

STUDENT	2014 Additional Financial Information	PARENT(S)
	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	
	Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support from children you claimed in household size.	
	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	
	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	
	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	
	Cooperative education program earnings.	

STUDENT	2014 Untaxed Income	PARENT(S)
	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes, D, E, F, G, H, and S.	
	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17.	
	Child support received for all children. Don't include foster care or adoption fees.	
	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b	
	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11A minus 11b). Exclude rollovers. If negative, enter a zero here.	
	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	
	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits) Don't include the value of on-base military housing or the value of a basic military allowance for housing.	
	Veterans' non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.	
	Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending plans (e.g. cafeteria plan), foreign income exclusion or credit for fed tax on special fuels.	
	Money received, or paid on your behalf (e.g. bills) not reported elsewhere on form.	

Student's Name _____ SSN: _____

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 2013 or 2014 calendar years.

One of the persons listed in Section B of this worksheet received SNAP benefits in 2013 or 2014.

Note: If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued the SNAP benefits in 2013 or 2014.

2. Complete this section if one or both of the parents included in the household and/or the student paid child support in 2014.

If one or both of the parents included in the household and/or the student paid child support in 2014, provide in the space below the names of the persons who paid the child support, the names of the persons to whom the child support was paid, the names and ages of the children for whom the child support was paid, and the total annual amount of child support that was paid in 2014 for each child. 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 Child Support	Name of Person to Whom Child Support was Paid	Name and Age of Child for Whom Support Was Paid	Annual Amount of Child Support Paid in 2014

Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided;
- A statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks or money order receipts, or similar records of electronic payments having been made.

F. High School Completion Status

You must attach one of the following documents (unless submitted during the admissions process) that indicates the student's high school completion status when the student will begin college in 2015–2016:

Check one box:

I have attached one of the documents below.

I submitted one of the documents below to the admissions office.

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript received by a student after the student passed a State-authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.

If the student is unable to obtain the documentation listed above, he or she must contact the financial aid office.

Student's Name _____ Student's SSN: _____

G. Identity and Statement of Educational Purpose

Instructions:

Either:

- The student must appear in person at the Troy University Financial Aid Office to verify his or her identity by presenting a valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. Troy University will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, in the presence of the Troy University Financial Aid Office official, the **Statement of Educational Purpose** below.

Or:

- If the student is unable to appear in person at the Troy University Financial Aid Office to verify his or her identity, the student must provide:
 - (a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
 - (b) The original notarized **Statement of Educational Purpose** provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose
(Print Student's Name)
and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Troy University for 2015-2016.

(Student's Signature)

(Date)

(Student's ID#)

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____,
(Date) (Notary's name)

personally appeared, _____, and proved to me
(Printed name of signer)

on basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal
(seal)

(Notary signature)

My commission expires on _____
(Date)

FOR OFFICE USE ONLY: Attach photocopy of ID after verifying identity

Document Used: _____ Date Received: _____ Authorized Name: _____

Student's Name _____ Student's SSN: _____

H. Certification and Signature

Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:

You must complete the FAFSA IRS Data Retrieval or submit a copy of your 2014 IRS Tax Return Transcript, W-2(s), and other IRS documents when you file your IRS income tax return for verification to be considered complete.

Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

If you file or later file an amended 1040X tax form, you agree to notify Troy University's Financial Aid Office and submit: a signed copy of the original 2014 IRS income tax return that was filed with the IRS; 2014 IRS Tax Return Transcript or acceptable IRS alternative, such as a Record of Account Transcript, a Return Transcript for Taxpayer (RTFTP), or an Information Returns Processing Transcript Request-Wages (IRPTR-W); **and** a signed copy of the 2014 IRS 1040X that was filed with the IRS.

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent must sign and date.

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

Student's Signature

Date

Parent's Signature

Date