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

Independent
Verification Worksheet (V1)
2015-2016
Call 1-800-414-5756 for questions

V1

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 student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of their support from July 1, 2015, through June 30, 2016, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides 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 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.

Student's Name____**SSN:**______________________

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

Instructions: Complete this section if the student and spouse 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 (and, if married, my spouse) 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 (and, if married, my spouse) 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 (and, if married, my spouse) 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, & 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 student and spouse filed separate 2014 IRS income tax returns, **2014 IRS Tax Return Transcripts, W-2 Forms, & other IRS documents** 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 Student Nontax 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 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 boxes that apply:

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

☐ The student's spouse (if married) was not employed and had no income earned from work in 2014.

☐ The student (and/or the student's spouse if married) 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 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 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	SPOUSE, if married
	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	SPOUSE, if married
	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:**______________________

D. Independent Student's Other Information to Be Verified

1. Complete this section if someone in the student'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 you or your spouse, if married, paid child support in 2014.

☐ If the student and/or spouse, who is a member of the student's household, 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 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 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, money order receipts, or similar records of electronic payments having been made.

E. 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.

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

______________________________ __________________
Student's Signature Date

______________________________ __________________
Spouse's Signature (Optional) Date