2014-15 (V6) Household Resources Verification Worksheet

Your 2014-2015 FAFSA was selected for review in a process called Verification. In this process, your school will be comparing information from your FAFSA with copies of your (and your spouse's if you are married, or your parent's if you are dependent) 2013 Federal tax transcript, and/or with W-2 forms and/or with other financial documents. Complete this verification worksheet and submit it, along with other required documents, to the financial aid office as soon as possible to avoid a delay in processing your financial aid. If you need help, contact the financial aid office at your school. *Your school must review the requested information under the financial aid program rules (34 CFR, Part 668) and submit corrections if necessary.*

A. Student Information

____   ______________________________
Last Name First Name MI   Student ID Number

____
Social Security Number

____
Address (include apt. #)

____
Date of Birth

____   (_____)________________________
City State Zip Code   Phone Number (include area code)

B. Family Information

Write the names of ALL household members* in the section below. LIST YOURSELF FIRST! Also write in the college name for any family member, excluding your parent, who will attend college at least half time between July 1, 2014 and June 30, 2015, and will be enrolled in a financial aid eligible program. If you need more space, attach a separate page.

Independent Student: List the people in **your household**. List yourself first, then your spouse if you have one, and your children **if you will provide more than half of their support from July 1, 2014 through June 30, 2015** even if they do not live with you. Include other people **only** if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Dependent Student: List the people in your **parent's household.** List yourself first, then your parent(s)/stepparent(s) (even if you do not live with them), and your parent/stepparent's other children who live with them. Include parent/stepparent's other children who do not live with them **if** your parent/stepparent will provide more than half of their support from July 1, 2014 through June 30, 2015 or **if** the children would be required to give parental information when applying for federal student aid. List any other people who now live in your parent/stepparent's household **if** your parent/stepparent provides more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
(example) Missy Jones	*24*	*Wife*	*City University*	*(Yes or No)*
		SELF	*KCTCS*	

C. Income and Financial Information to Be Verified

☐ **Check this box if anyone in the household listed in Section B received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) at any time during 2012 or 2013**. If asked by my school, I will provide documentation from the agency that issued the SNAP benefits during 2012 or 2013.

☐ **Check this box if you, the student, or your parent included in the household in Section B, paid child support in 2013.** Indicate below the name of the person who paid child support, the name of the person to whom child support was paid, the name of the child/children for whom child support was paid, and the total amount of child support that was paid in 2013. If asked by my school, I will provide documentation of the payment of child support.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support was Paid	Amount of Child Support Paid in 2013
(example) Marty Jones	*Chris Smith*	*Terry Jones*	*$6000*

☐ **Check this box IF A TAX RETURN WAS FILED and complete the section below. If you (and your spouse or parents, if applicable) filed a 2013 tax return, check all the boxes that apply (see additional instructions included with worksheet).**

STUDENT	SPOUSE	PARENT	
☐	☐	☐	**used** the IRS Data Retrieval Tool (DRT) in *FAFSA on the Web* to transfer 2013 IRS income tax info to the FAFSA when I first submitted the FAFSA.
☐	☐	☐	**did not use** the IRS DRT in *FAFSA on the Web* when FAFSA was first submitted, **but used** DRT to transfer income tax info to the FAFSA on (MM/DD/YY) _____/_____/_____.
☐	☐	☐	**is unable or chose not to use** the IRS DRT and **has included** a 2013 IRS **Tax Return** transcript along with this worksheet to the college financial aid office.

☐ **Check this box IF A TAX RETURN WAS NOT FILED and complete the section below. If you (and your spouse or parents, if applicable) are not required to file a 2013 federal tax return, check all the boxes that apply.**

STUDENT	SPOUSE	PARENT	
☐	☐	☐	**was not employed** and earned no income from work in 2013.
☐	☐	☐	**was employed and earned income** from work in 2013 but **was not required to file** a tax return. List **all** employers in the section below even if you did not receive a W-2 Form. Attach all W-2 Forms received. ***Attach a separate sheet if more space is needed.***

Employee Name	Employer Name	2013 Amount Earned	W-2 Form Received?
(example) John Smith	*Suzy's Body Shop*	*$2000*	*(Yes or No)*

D. Verification of Unusually Low Income/Other Untaxed Income for 2013

Because the income reported on your FAFSA is unusually low for the number of household members you reported, you are required to answer additional questions about how you paid for basic living expenses (food, housing, utilities, etc.) during 2013. Answer all the sections below. If any item does not apply, enter "N/A" for Not Applicable where a response is requested, or enter "0" in an area where an amount 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) whose information is on the FAFSA.

Report only yearly amounts! To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2013, multiply that amount by the number of months in 2013 you paid or received it. If you did not pay or receive the same amount each month in 2013, add together the amounts you paid or received each month.

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

1. **Payments to tax-deferred pension and retirement savings**: List any payments (direct or withheld from earnings) to tax-deferred pension plans (401(k) or 403(b) plans, for example), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes of D, E, F, G, H, and S. **Submit copies of all W-2s.**

Name of Person Who Made the Payment	Total Amount Paid in 2013

2. **Child Support Received**: List the actual amount of child support received in 2013 for the children in your household. **Do Not Include** foster care payments, adoption payments or any amount that was court-ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child for Whom Support was Received	Amount of Child Support Received in 2013

3. **Housing, food, and other living allowances paid to members of the military, clergy, and others**: Include cash payments and/or the cash value of the benefits received. **Do Not Include** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2013

4. **Veterans non-education benefits**: List the total amount of veterans non-education benefits received in 2013. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study Allowances. **Do Not Include** federal veterans educational benefits such as Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits or Post-9/11 GI Bill.

Name of Recipient	Type of Veterans Non-Education Benefit Received	Amount of Benefit Received in 2013

5. **Other Untaxed Income**: List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. **Do Not Include** any items reported in 1-4 above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits form flexible spending arrangements (cafeteria plans, for example), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income Received	Amount of Other Untaxed Income Received in 2013

6. **Money received or paid on the student's behalf**: List any money received or paid on the student's behalf (payment of student's bills, for example) not reported elsewhere on this form. Enter the total amount of cash support the student received in 2013. Include support from a parent whose information was not reported on the student's 2014-2015 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc. for the student or gives the student cash, gift cards, etc., include the amount of that person's contributions **unless the person is the student's parent whose information is reported on the 2014-2015 FAFSA.** Amounts paid on the student's behalf also include any distributions to the students from a 529 plan owned by someone than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Purpose (Cash, Rent, Books, etc.)	Amount Received in 2013	Source (Person Who Paid for It)

7. **Additional Information:** So that we can fully understand the student's family's financial situation, please provide below 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, Social Security, Social Security Disability and/or SSI, etc. If more space is needed, provide a separate page with the student's name and ID number at the top.

Name of Recipient	Type of Support Received	Amount of Support Received in 2013

8. **In case the information in items 1-7 above are not sufficient, use the space provided below to briefly explain how you (the student) and your household (parents, if dependent or spouse, if married) paid for your basic living expenses (food, housing, utilities, etc.) during 2013.**

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F. Certification and Signatures

Each person signing this worksheet certifies that all information reported on it is complete and correct. If student is dependent, at least one parent must sign.

Your financial aid cannot be processed until the financial aid office receives the required Verification documents. Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668), and submit corrections if necessary.

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

____ ____

Student's Signature Date Parent's Signature (Dependent Students Only) Date

2014-2015 INSTRUCTIONS FOR VERIFYING TAX INFORMATION

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web. If you have not already used the tool, go to www.fafsa.gov, log in and select "Make FAFSA Corrections." In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2013 IRS income tax information into your FAFSA. You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the DRT.

If you are unable or choose not to use the IRS DRT, you **must** obtain an IRS tax return transcript (copies of your original Form 1040 tax return are not acceptable for verification purposes). In most cases, for electronic filers, a 2013 IRS Tax Return Transcript is available from the IRS within 2-3 weeks after filing. If you filed a paper return, expect 8-11 weeks for your transcript to be available.

To request an IRS tax return transcript, go to www.IRS.gov and click the "Get Transcript of Your Tax Records" link. Make sure you request the "**Tax Return**" transcript and **NOT** the "Tax Account" transcript. Use the Social Security Number and date of birth of the first person listed on the 2013 tax return and the address on file with the IRS (normally the address used when your 2013 IRS tax return was filed).

You may select "Get Transcript ONLINE" and immediately print your transcript or Get Transcript by MAIL. Provide the transcript to the financial aid office along with your Verification Worksheet.

If you are unable or choose not to use the DRT and cannot access your IRS **"Tax Return"** transcript online, you must call the IRS at 1-800-908-9946 to receive a transcript.

Special Situations:

Amended Returns-If you filed an amended tax return, you must submit a signed copy of your original Form 1040 **OR** an IRS Tax Return Transcript **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return" along with your completed Verification Worksheet.

Victims of IRS Identity Theft-A victim of IRS identity theft who is not able to obtain a 2013 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490 to receive a printout of the tax return by mail. Submit this printout along with documentation of the identity theft to the financial aid office along with your Verification Worksheet.

Non-IRS Income Tax Returns-An individual who filed or will file a 2013 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a signed copy of the 2013 income tax return along with the Verification Worksheet.