

Verification Worksheet-Standard

COMPLETE ALL SECTIONS:

****AN INCOMPLETE FORM WILL DELAY PROCESSING**

2017-2018

Your financial aid application has been selected for a process called verification. In this process, we will be comparing information reported on your FAFSA with the information provided on and submitted with this form. The law states that we must review this information before awarding and disbursing federal aid. If there are any differences between the information you submitted to our office and the information reported on the FAFSA, we will make corrections to your FAFSA.

Student's name: _____
Last First MI

Address: _____
Street Address City/State Zip Code

Date of birth: ____/____/____ **SSN:** _____ **Home Phone:** (____) _____
Month Day Year

Email Address _____ **Cell Phone:** (____) _____

A. Household Information

Please complete each column. Write the names of the household members living under the same roof from July 1, 2017 to June 30, 2018 as defined below:

- Yourself
- Your parent(s) (Including stepparent)
- Your parent's other children (even if they do not currently live with your parent) if your parent(s) will provide more than half of their support, or if the children would be required to provide parental information if they were completing a FAFSA.
- Other people if they now live with your parent(s) and your parent(s) provides and will continue to provide more than half of their support

Full Name of Member in Household	Age	Relationship to Student	Name of College Currently Attending
		<i>Self</i>	<i>Webber International University</i>

B. Tax Forms and Income Information

SUBMIT ALL W2'S

Have you, **the student**, filed a 2015 Federal Tax Return?

If YES:

- I used the IRS Data Retrieval Tool (DRT) on my FAFSA and did not change any data.
- I will update my FAFSA using the IRS DRT on www.fafsa.gov
- I am not eligible for or chose not to use the IRS DRT; or filed a tax extension (attach copy of tax extension). I will request and submit a Federal Tax Return Transcript. Instructions provided in Frequently Asked Questions section on next page.

If NO: I will not file and I am not required to file a 2015 US Federal Tax Return, as my income was less than the required minimum.

If "no", list any income received in 2015 on the table below and attach your W2. If zero, put "N/A"

Have you, **the parent**, filed a 2015 Federal Tax Return?

If YES:

- I used the IRS Data Retrieval Tool (DRT) on my FAFSA and did not change any data.
- I will update my FAFSA using the IRS DRT on www.fafsa.gov.
- I am not eligible for or chose not to use the IRS DRT; or filed a tax extension (attach copy of tax extension). I will request and submit a Federal Tax Return Transcript. **Instructions provided in Frequently Asked Questions section on next page, Question 2.**

If NO: I will not file and I am not required to file a 2015 US Federal Tax Return, as my income was less than the required minimum.

If "no", list any income received in 2015 on the table below and attach your W2. If zero, put "N/A"

If you or your parent were not required to file, please provide WIU with the name of your employer and the amount you received in 2015.

Name	Employer	Amount
Student Name:		
Parent Name:		
Parent/Stepparent Name:		

Are you or your parent(s) self-employed?	Yes	No
Student:		
Parent:		
Parent/Stepparent:		

Read carefully and do not leave anything blank.

Student's name _____

SSN: _____

C. Untaxed Income

Both tax filers and non-tax filers must list any untaxed income received in 2015. Be sure to enter zeros if no funds were received. Failure to complete this section will delay the processing of your financial aid.

Student and/or Spouse		Parents (including step-parent)
	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) including but not limited to, amounts reported on W-2 Form Box 12a-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 – line 28 + line 32 or 1040A – line 17	
	Tax exempt interest income from IRS Form 1040 – line 8b or 1040A – line 8b.	
	Untaxed portions of IRA distributions from IRS Form 1040 – line (15a minus 15b) or 1040A – lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here. If entering a figure, please include a copy of the 1099R.	

D. Frequently Asked Questions

1. **Q. Why must I request a tax transcript?**

A. If you or your parent did not use the IRS Data Retrieval Tool when you complete the FAFSA and were selected for verification, you will be required to provide Webber International University with an official tax transcript that you must request and receive directly from the Internal Revenue Service (IRS). It is strongly recommended that the applicant use the IRS Data Retrieval Tool located on the FAFSA application when first completing the FAFSA.

2. **Q. How do I get a tax transcript from the IRS?**

A. **The quickest way to request a tax return transcript, is to go to <http://www.irs.gov/Individuals/Get-Transcript>. With this method, you can access your documents in minutes.** If you are unable to use this tool, you can call IRS at 1-800-908-9946, visit a local IRS Office or go to the IRS web page: www.irs.gov and "Order a Transcript". If you order by phone, mail, or online, the request could take up to 10 business days. Please note that if you filed your federal tax return online, it may take up to three weeks from the time that you filed before your tax transcript is available. If you filed a paper tax return (through the mail), please allow six to eight weeks after filing before the tax transcript is available.

3. **Q. Where should I have the transcript sent?**

A. Tax transcripts will be sent to the home address listed on your tax return if you order your transcript online. Once it arrives at your home, you can fax, email, mail or bring it in physically if you would like.

Fax: (863) 638-1513

Email: Financialaid@webber.edu

Mail: 1201 N. Scenic Hwy
Babson Park, FL 33843
Attention: Financial Aid

4. **Q. What if my address has changed since I filed my tax return?**

A. The IRS cannot process your request online if you need transcripts mailed to an address other than the one they have on file for you. You may call 1-800-908-9946 for assistance, or complete and mail Form 4506-T to the IRS. Please note that this may take up to 30 days for processing.

5. **Q. What if I filed an amended tax return?**

A. Signed copies of both the original tax return and the IRS Form 1040X that were filed with the IRS must be submitted to WIU with the verification worksheet when filing an amended tax return.

6. **Q. What if I am a victim of Identity Theft?**

A. When the IRS determines that a tax filer has been, or likely was, a victim of identity theft, it will **NOT** allow that tax filer to obtain tax information through the use of the IRS DRT or to receive an IRS Tax Return Transcript until the matter has been resolved by the IRS. Therefore, in instances when the tax filer has been the victim of identity theft, the institution may accept, for verification purposes, a signed copy of the paper IRS income tax return that was filed with the IRS along with a signed copy of an IRS Form 14039 "Identity Theft Affidavit."

7. **Q. What if I did not use the IRS Data Retrieval Tool, can I go back and change it on the FAFSA?**

A. You can go back to your FAFSA to try the IRS Data Retrieval Tool; however, there are certain circumstances where you may not be eligible for this tool. You may go to the FAFSA application to find these requirements.

E. Certification Statement

By signing below, both student and parent(s) acknowledge and confirm that the above is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. If parent's(s) income is included in this form, at least one parent must sign.

Student's name: _____ Signature: _____ Date: _____

Parent's name: _____ Signature: _____ Date: _____

If both parents are non-tax filers, then you are required to have both parents sign this document.

Parent's name: _____ Signature: _____ Date: _____