

2018-2019 VERIFICATION FORM – INDEPENDENT STUDENT

| | | |
|----------------------|---------------------|--------------------|
| Date of Birth: _____ | Phone Number: _____ | Banner ID: @ _____ |
|----------------------|---------------------|--------------------|

Name and Address (Student)

E-mail Address: _____

Return to: Financial Aid Office
 Clark Hall, IUP
 1090 South Drive
 Indiana, PA 15705
 Fax: 724.357.2094

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 Your 2018–2019 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The regulations indicate that before awarding Federal Student Aid, we must ask you to confirm the information you and your spouse (if you are married) reported on your FAFSA. To verify that you provided correct information, the Financial Aid Office staff will compare your FAFSA with the information on this worksheet and with any other required documents. You must complete and sign this worksheet, attach any required documents, and submit all required documents to the Financial Aid Office. IUP may ask for additional information.

A. NUMBER OF HOUSEHOLD MEMBERS AND NUMBER IN COLLEGE

1.) List the people in your household that you and your spouse (if applicable) will support between July 1, 2018 and June 30, 2019. Include:

- Yourself (**student**).
- Your **spouse**, if you are married.
- **Your children**, if any, if you or your spouse will provide *more than half* of their support and will continue to do so between July 1, 2018 and June 30, 2019.
- **Other people** 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 from July 1, 2018 through June 30, 2019.

2.) List the College/University: Include the full name (not just initials), if applicable, of the college for any household member who will be enrolled **at least half-time in a degree or certificate program** at an eligible post-secondary institution any time between July 1, 2018 and June 30, 2019. High school/elementary school name **does not** need to be reported for any family member.

| Full Name | Age | Relationship to Student | College/University in 2018-2019 |
|-----------|-----|-------------------------|------------------------------------|
| | | STUDENT (Self) | Indiana University of Pennsylvania |
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If more space is needed, attach a separate page include student name and IUP Banner ID.

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 are inaccurate.

B. STUDENT’S 2016 INCOME INFORMATION

1. STUDENTS WHO FILED A FEDERAL TAX RETURN—Important Note: The instructions below apply to the student and spouse, if the student is married.

Instructions: Complete this section if the student and/or spouse (if married) **filed or will file** a 2016 IRS income tax return. **If the student and/or spouse did not and is not required to file a 2016 IRS income tax return, please skip this section and proceed to Section 2 for “STUDENTS WHO DID NOT FILE A FEDERAL TAX RETURN”.** 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 www.FAFSA.gov.

Did you file a 2016 U.S. Federal Tax Return? Please check one box only.

- The student has used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student’s FAFSA.
- The student has not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA.
- The student is unable, or chooses not to use the IRS Data Retrieval Tool in *FAFSA on the Web*, and instead will provide the school with a 2016 IRS Tax Return Transcript(s) or a **SIGNED** copy of 2016 Federal Tax Return. **See page 3 for instructions on how to obtain a Tax Return Transcript.**

Please check the applicable box below if the student and spouse filed separate 2016 IRS income tax returns. The IRS DRT cannot be used and the 2016 IRS Tax Return Transcript(s) must be provided for each:

- Check here if a **2016 IRS Tax Return Transcript(s)** or **SIGNED** copy of 2016 Federal Tax Return is provided.
- Check here if a **2016 IRS Tax Return Transcript(s)** or **SIGNED** copy of 2016 Federal Tax Return will be provided later.

2. STUDENTS WHO DID NOT FILE A FEDERAL TAX RETURN

Complete this section if the student **WILL NOT FILE AND IS NOT REQUIRED** to file a 2016 income tax return with the IRS.

- The student and/or spouse was not employed and had no income earned from work in 2016.
- The student and/or spouse were employed in 2016 and has listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. [Provide copies of all 2016 IRS W-2 forms issued to the student and spouse (if married) 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 | IRS W-2 Provided? | Annual Amount Earned in 2016 |
|---|-------------------|------------------------------|
| <i>(Example) ABC’s Auto Body Shop</i> | Yes | \$4,500.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority. Instructions on how to obtain a letter of non-filing or alternative acceptable documentation can be found on page 3.

- ___ Check here if confirmation of non-filing is provided.
- ___ Check here if confirmation of non-filing will be provided later.

C. CERTIFICATION AND SIGNATURES (REQUIRED)

By signing this worksheet, I/we certify that all the information reported is complete and correct. The student must sign and date. I understand that the Financial Aid Office will make corrections on the FAFSA if any differences are discovered during the verification process.

Student's Signature: _____ Date _____

Spouse's Signature: _____ Date _____
(if married)

(Please make a copy of this worksheet for your records.)

INCOMPLETE FORMS WILL NOT BE ACCEPTED. ADDITIONAL DOCUMENTATION MAY BE REQUESTED.

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

A 2016 IRS Tax Return Transcript May Be Obtained Through:

- 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 the 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

A 2016 IRS Verification of Non-filing Letter May Be Obtained Through:

- Get Transcript ONLINE or by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE" or "Get Transcript by Mail". To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Paper Request Form – IRS Form 4506-T by completing lines 1-4 (following instructions from page 2 of the form) and checking box 7. Year or period requested field should be "12/31/2016". The non-filer must sign and date the form and enter their telephone number. The form should be mailed or faxed to the appropriate address or FAX number provided on page 2 of the form.

If you have attempted to obtain a 2016 IRS Verification of Non-filing letter, but were unable to obtain, you may instead submit:
A SIGNED STATEMENT CERTIFYING THAT THE YOU:

- Attempted to obtain the Verification of Non-filing from the IRS or other tax authorities and was unable to obtain the required documentation; AND
- Has not filed and is not required to file a 2016 income tax return, and a listing of the sources of any 2016 income earned by the individual from work and the amount of income from each source; AND EITHER
- A copy of IRS Form W-2, or an equivalent document, for each source of 2016 employment income received by the individual if the individual worked in 2016. OR
- Include in the signed statement that the individual did not work and has no income in 2016.