



**2015-2016 Verification Worksheet**

Office of Financial Aid  
 701 N. Clinton Street  
 Defiance, OH 43512  
 Phone: 419-783-2458  
 Fax: 419-783-2579

**Household Resources**

The U.S. Department of Education selected your financial aid application for a review in a process called verification. Verification is a process in which the Financial Aid Office determines the accuracy of the information provided on the FAFSA. Please provide the following information:

**A. Student Information:**

\_\_\_\_\_ Student Name

\_\_\_\_\_ Social Security Number

\_\_\_\_\_ Email Address

\_\_\_\_\_ Phone Number

**B. Family Information:**

Write the names of all family members in your household. List the name of the college if this family member will attend at least ½ time between 7/1/2015 and 6/30/2016 and will be enrolled in a degree or certification program.

**Dependent Students:** List the people that your parents will support between July 1, 2015 and June 30, 2016. Include yourself, your parents, and your parents’ dependent children (if your parents provide more than half support).

**Independent Students:** List the people that you (and your spouse) will support between July 1, 2015 and June 30, 2016. Include yourself, your spouse, and your dependent children (if you provide more than half their support).

Full Name	Age	Relationship	College
		Self	Defiance College

**C. Benefit Information**

In 2012 or 2013, did you or anyone in your household receive benefits from any of the federal benefit programs listed below?

**Supplemental Security Income**

Yes  No If yes, yearly amount: \$ \_\_\_\_\_

**Food Stamps (SNAP)**

Yes  No

DC Office Use Only	DATE
PIRS	_____
SIRS	_____
Contacted	_____
Completed	_____

**D. Tax Information**

<b>Federal Tax Return Filing Status</b> *please include W-2(s) for all jobs worked	
<b>Student (and Spouse) Filing Status</b> <input type="checkbox"/> I have already filed my 2014 tax return and <input type="checkbox"/> I used the FAFSA IRS Data Retrieval Tool <input type="checkbox"/> I requested an IRS tax return transcript  <input type="checkbox"/> I will, but have yet to, file my 2014 tax return <input type="checkbox"/> I will not and am not required to file, but in 2014, I earned \$_____ from work	<b>Parent(s) Filing Status</b> <input type="checkbox"/> My parents have already filed their 2014 tax return and <input type="checkbox"/> They used the FAFSA IRS Data Retrieval Tool <input type="checkbox"/> They requested an IRS tax return transcript  <input type="checkbox"/> My parents will, but have yet to, file their 2014 tax return <input type="checkbox"/> My parents will not and are not required to file, but in 2014, they earned \$_____ from work

**E. Untaxed Portions of IRA Distributions and Pensions (refer to your 2014 Federal Tax Return)**

In 2014, did you or anyone in your household report untaxed portions of IRS distributions or pensions?

Yes       No

If yes, please provide the following information:

**IRS Distribution Information:**

IRS Form 1040-line 15a \$\_\_\_\_\_ 15b \$\_\_\_\_\_ Was this a rollover?  Yes  No

IRS Form 1040A-line 11a \$\_\_\_\_\_ 11b \$\_\_\_\_\_ Was this a rollover?  Yes  No

**Pension Information:**

IRS Form 1040-lines 16a \$\_\_\_\_\_ 16b \$\_\_\_\_\_ Was this a rollover?  Yes  No

IRS Form 1040A-lines 12a \$\_\_\_\_\_ 12b \$\_\_\_\_\_ Was this a rollover?  Yes  No

**F. Payments to tax-deferred pension and retirement savings**

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401 (k) or 403 (b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H and S.

Name of Person Who Made the Payment	Total Amount Paid in 2014

**G. Child Support Paid**

Did anyone in the household pay out child support in 2014?     Yes (include information below)     No

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 2014

(attach a separate document if needed)

**H. Child Support Received**

List the actual amount of any child support received in 2014 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 Child Support	Name of Child for Whom Support Was Received	Amount of Child Support Received in 2014

**I. Housing, food and other living allowances paid to the military, clergy, and others.**

Include cash payments and /or the cash value of 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 received in 2014 \$ \_\_\_\_\_

**J. Veterans non-education benefits**

List the total amount of veterans non-education benefits received 2014. 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, Post-9/11 GI Bill.

Name of recipient \_\_\_\_\_

Type of non-education benefit received \_\_\_\_\_

Amount received in 2014 \$ \_\_\_\_\_

**K. 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 or excluded in A-D 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 from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of recipient \_\_\_\_\_

Type of non-education benefit received \_\_\_\_\_

Amount received in 2014 \$ \_\_\_\_\_



## How to use the IRS Data Retrieval Tool

1. Sign in at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
2. Select either **Continue** (if you have already started a FAFSA, but have yet to submit it) or **Make a Correction** (if you wish to correct an already submitted FAFSA)
3. Choose the **Parent Demographic Tab**, scroll to the bottom of the page and click **Next**
4. The first question regarding tax filing status needs to be answered **Already Completed**
5. Review the boxes to see if any of the following circumstances apply; if not, select **None of the Above**.
  - a. You cannot use the retrieval tool if any of the following apply:
    - i. Married, filing separately
    - ii. Filed as Head of Household
    - iii. Filed an amended tax return
    - iv. Filed a Puerto Rican or foreign tax return
6. You will be presented with the option to link to the IRS.
  - a. Click **Link**
  - b. Fill in filing status (choose from drop down list)
  - c. Fill in address information (the address information must match the address exactly as it was used to file the 2013 tax returns)
  - d. Select **Transfer into FAFSA** button
7. Once back into the FAFSA, go to the bottom of the screen and click **Save**, then click **Next**
8. For the **Student's IRS Return Retrieval**, repeat steps 4-7, making sure that you have clicked on the student section.
9. Once back into the FAFSA, save and submit your FAFSA by signing with your FAFSA PIN and agreeing to their terms, then click **Submit**.

## IRS Tax Transcript Request Process

Tax filers can request a transcript, free of charge, of their 2014 tax return from the IRS in one of three ways:

### **Option #1: Online Request**

Available on the IRS website at [www.irs.gov](http://www.irs.gov)

- In the **Online Services** section of the homepage click **Order a Tax Return Transcript**
- Click **Order a Transcript**
- Enter the tax filer's social security number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Click **Continue**
- In the **Type of Transcript** field, select **Return Transcript** and in the Tax Year field, select **the year you are requesting**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within five to 10 days from the time the online request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

### **Option #2: Telephone Request**

- Available from the IRS by calling 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select **Option 2** to request an IRS Tax Return Transcript and then enter **the year you are requesting**.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within five to 10 days from the time the IRS receives the request.

### **Option #3**

#### **Paper Request**

- Use IRS for 4506T-EZ,
  - Download at [irs.gov/pub/irs-pdf/f4506tez.pdf](http://irs.gov/pub/irs-pdf/f4506tez.pdf)
- Mail to the appropriate address located on page 2 of the form
- Wait 5-10 days upon receipt and processing of the form for delivery of your transcript

**Upon receipt of your IRS Tax Transcript, please submit to the Financial Aid Office.**

Defiance College  
Financial Aid Office  
701 North Clinton Street  
Defiance, OH 43512  
Fax: 419-783-2579  
Phone: 419-783-2458