

## 2016-2017 (V5) Aggregate Verification Worksheet

Your 2016-2017 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) 2015 federal tax transcript, and/or W-2 forms and/or 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
Address (include apt. #)		
City	State	Zip Code

Student ID Number
Social Security Number
Date of Birth
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, 2016 and June 30, 2017, 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, 2016 through June 30, 2017** 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, 2017.

**\*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, 2016 through June 30, 2017 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/ step-parent'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, 2017.

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

### 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 2014 or 2015. If asked by my school, I will provide documentation from the agency that issued the SNAP benefits during 2014 or 2015.
- Check this box if you, the student, or your parent included in the household in Section B, **paid child support in 2015**. 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, the age of the child/children and the total amount of child support that was paid in 2015. 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	Age of Child	Amount of Child Support Paid in 2015
<i>(example) Marty Jones</i>	<i>Chris Smith</i>	<i>Terry Jones</i>	<i>5</i>	<i>\$6000</i>

- 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 2015 tax return, check all the boxes that apply (see additional instructions included with worksheet).

STUDENT	SPOUSE	PARENT	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>used</u> the IRS DRT in <i>FAFSA on the Web</i> to transfer 2015 IRS income tax info to the FAFSA when I first submitted the FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>did not use</u> the IRS DRT in <i>FAFSA on the Web</i> when FAFSA was first submitted, <u>but used</u> DRT to transfer income tax info to the FAFSA on (MM/DD/YY) ____/____/____.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>is unable or chose not to use</u> the IRS DRT and <u>has included</u> a 2015 <u>IRS Tax Return Transcript</u> 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 2015 federal tax return, check all the boxes that apply.

STUDENT	SPOUSE	PARENT	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>was not employed</u> , earned no income from work, and was not required to file a 2015 tax return.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>was employed and earned income</u> from work in 2015 but <u>was not required to file</u> a tax return. List <b>all</b> employers in the section below even if you did not receive a W-2 Form. <b>Attach all W-2 forms received.</b> Attach a separate sheet if more space is needed.

Employee Name	Employer Name	2015 Amount Earned	W-2 Form Received?
<i>(example) John Smith</i>	<i>Suzy's Body Shop</i>	<i>\$2000</i>	<i>(Yes or No)</i>

## D. Verification of Student's High School Completion Status

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You, the student, **must** provide one of the following documents to verify high school completion status.

- Copy of high school diploma
- Copy of final official high school transcript indicating graduation date
- Copy of GED certificate
- Copy of "secondary school leaving certificate" or similar document if graduated in a foreign country
- Copy of a college academic transcript indicating completion of at least a two-year program acceptable for full credit toward a bachelor's degree
- For a home schooled student from a state where state law require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a home schooled student from a state where state law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its equivalent), a transcript or the equivalent, signed by the student's parent or legal guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting

## E. Student's Identity Statement of Educational Purpose

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- You, the student, must appear at the financial aid office to sign a "Statement of Educational Purpose" in the presence of an authorized college financial aid official. You are required to present a valid, *unexpired*, government-issued photo ID (such as a driver's license, other state-issued ID or passport) which must be photocopied.
- If you cannot appear in person, you must submit an officially notarized "Statement of Educational Purpose" (you must submit the original, not a photocopy) along with a photocopy of the valid, *unexpired*, government-issued ID acknowledged in the notary statement.

## F. Certification and Signatures

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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.

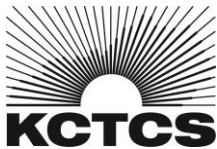
**WARNING:** *If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.*

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (Dependent Students Only)

\_\_\_\_\_  
Date



## IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE

Student's name (PRINT): \_\_\_\_\_ Student ID: \_\_\_\_\_

**DO NOT complete this form in advance.** You must 1) complete this form, in person, at the Office of Financial Aid **OR** 2) sign this form in the presence of a notary public and mail, the original, notarized document to the Office of Financial Aid.

### Identity and Statement of Educational Purpose

You must present an *unexpired* valid government-issued photo identification, such as, but not limited to, a driver's license, other state-issued ID, or passport to verify your identity.

I certify that I, \_\_\_\_\_, am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending \_\_\_\_\_ for 2016-2017.  
*(Print student's name)*  
*(Name of Postsecondary Educational Institution)*

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### To be completed by a Notary Public (If not appearing in person)

If you are unable to appear in person at the Office of Financial Aid please also complete the below section to verify your identity. You must complete this form in the presence of a notary public. You must then provide the original notarized statement, as well as a copy of the *unexpired* valid government-issued photo identification, acknowledged below, to the Office of Financial Aid.

State of \_\_\_\_\_ City/County of \_\_\_\_\_

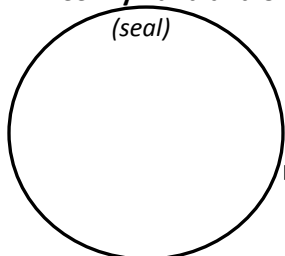
On \_\_\_\_\_, before me, \_\_\_\_\_  
*(Date)* *(Notary's name)*

personally appeared \_\_\_\_\_, and proved to me on a basis of satisfactory  
*(Printed name of signer)*

evidence of identification \_\_\_\_\_ to be the above-named person who  
*(Type of government-issued photo ID provided)*

signed the foregoing instrument.

**WITNESS my hand and official seal**



\_\_\_\_\_  
*(Notary Signature)*

My commission expires on \_\_\_\_\_  
*(Date)*

**KCTCS is an equal opportunity employer and education institution**

## 2016-2017 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](http://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 2015 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 2015 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](http://www.irs.gov), under the Tools heading on the IRS homepage, and click "Get a Tax Transcript by Mail." Make sure you request the "**IRS Tax Return Transcript**" and **NOT** the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the 2015 tax return and the address on file with the IRS (the address used when your 2015 IRS tax return was filed). 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 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 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 tax-related identity theft must provide a Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript that includes all of the income and tax information required to be verified **AND** a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

**Non-IRS Income Tax Returns** - An individual who filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a transcript that was obtained at no cost from the relevant taxing authority that includes all of the tax filer's income and tax information required to be verified for the 2015 tax year **OR** a signed copy of the 2015 income tax return along with the Verification Worksheet.

**Filing Extensions** – An individual who has been granted a filing extension by the IRS must provide a copy of IRS 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for the 2015 tax year, a copy of the IRS's approval of an extension, **AND** a copy of the W-2 for each source of employment income received for the 2015 tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the 2015 tax year.