ROBERTS WESLEYAN COLLEGE

2017-2018 Verification Worksheet

for Federal Student Aid Programs

The Department of Education has selected your FAFSA for review in a process called "Verification." *This process requires Roberts Wesleyan College (RWC) to compare information from your FAFSA with information collected on and attached to this worksheet.* ***The law requires us to receive this information before disbursing Federal aid.*** *Any differences between your FAFSA and the documentation requested could result in changes made to your FAFSA by Roberts Wesleyan College and/or your aid eligibility. Failure to complete the verification process in a timely manner may result in the loss of financial aid eligibility. This review must be conducted under the U.S. Department of Education financial aid regulation 34CFR, Part 668.*

Student Last Name First Name M.I. Email address

Home Address Cell Phone number (include area code)

(IF DEPENDENT, Provide Parental Contact Information: Name and Daytime Phone or email addresss Home Phone number (include area code)

DEPENDENCY STATUS Identify which dependency status you were considered when filing your FAFSA.

☐ **Dependent** *(If you were required to provide parental information on your FAFSA even if you do not live with your parent.)*

☐ **Independent** (If you met independency criteria on the FAFSA)

HOUSEHOLD SIZE/NUMBER IN COLLEGE **Provide the names of ALL people in your household** for the 2017-2018 academic year (July 1, 2017 through June 30,2018). Use the criteria below to determine who is to be considered as part of the household. **Also include information for all household members (other than a parent) who will attend a federally eligible higher education institution** at least half time during the 2017-2018 academic year.

Dependent Students INCLUDE: yourself and your parents (including stepparent) who reside in their household, even if you do not live with them.
Also your parents other children IF the parents will provide more than half of the children's support or if the other children would be required to provide parental information if they were completing a FAFSA for 2017-2018.
Also other people if they now live with the parents, the parents provide more than half of the other people's support and will continue to provide more than half of their support through June 30, 2018 . **Additional documentation may be required.*

Independent Students INCLUDE: yourself and your spouse (if married)
Also yours or your spouse's children if you or your spouse will provide more than half of the children's support.
Also other people if they now live with you and you provide more than half of the other people's support and will continue to provide more than half of their support through June 30, 2018. **Additional documentation may be required.*

Household Member Full Name	Age	Relationship	College attending for 17/18*	Enrolled at least half time?
STUDENT NAME:		SELF	ROBERTS WESLEYAN COLLEGE	YES NO
SPOUSE OR PARENT/STEPPARENT NAME:				YES NO
2nd PARENT/STEPPARENTor OTHER NAME :				YES NO
OTHER HOUSEHOLD MEMBERS:				YES NO
				YES NO
				YES NO

Students who have a **parent attending college at least half time in a degree seeking program at a federally eligible post secondary college or institution should contact the RWC Office of Financial Aid to determine whether a reconsideration request of the student's federal aid should be completed.*

PLEASE NOTE THAT, FOR THE 2017-2018 ACADEMIC YEAR, THE INCOME INFORMATION COLLECTED FOR THE FAFSA, AND FOR VERIFICATION PURPOSES, WILL USE 2015 INCOME AND TAX INFORMATION .

Students who completed a FAFSA in 2016-2017: Although the 2016-17 and 2017 17-18 FAFSA's should contain the same 2015 income and tax information, there is a possibility that there might be conflicting information between the two years. Per federal regulations, Federal student aid must be based on correct information. Roberts Wesleyan College may require additional information or to make changes to either the 2016-17 or 2017-18 FAFSA, or both.

VERIFICATION OF 2015 INCOME INFORMATION. If the student/spouse/parents filed a 2015 IRS Tax Return, *the easiest* and fastest way to verify income is to u*se the* ***IRS Data Retrieval Tool (IRS DRT) on the students FASFA.*** *If successfully transferred and not changed, no further documentation is needed. If you are unable to use the Data Retrieval Tool, obtain your* ***2015 IRS Tax Return Transcrip****t online at* ***www.irs.gov / Tools/ "Get a tax return transcript" or by phone at 1-800-908-9946.*** *Tax Filing must be in compliance with all federal IRS regulations.*

-Check the appropriate box for the student, spouse (if married) and/or each parent included in the household. ***DO NOT LEAVE BLANK.***

STUDENT	PARENTS or SPOUSE	Complete the Following if you Filed a 2015 IRS Tax Return:
		- has used the IRS Data Retrieval Tool to transfer 2015 IRS Income Tax return information into the student's FAFSA.
		-is unable or chooses not to use the IRS Data Retrieval Tool, and instead will provide the school with a **2015 IRS TAX RETURN TRANSCRIPT.** Note: If the (student/parents reported in the household) marital status has changed since the 2015 tax return was filed and you are now married*, a 2015 Tax Return Transcript must be provided for both (either spouse or parents). ( ) The 2015 IRS Tax Return Transcript is attached. ( ) The 2015 IRS Tax Return Transcript will be provided.

STUDENT	PARENTS or SPOUSE	Complete the Following if you DID NOT File a 2015 IRS Tax Return:
		- WAS NOT employed, and had no income earned from work in 2015.
		WAS employed but was not required to file a tax return. Provide information regarding your income AND attach all W-2's: _____ ( ) W-2 attached NAME OF EMPLOYER AMOUNT OF 2015 EARNINGS _____ ( ) W-2 attached NAME OF EMPLOYER AMOUNT OF 2015 EARNINGS_

Income information for Individuals with Unusual Circumstances (check if one applies to you):

____ Individual **granted a filing extension** by the IRS and required to file a 2015 IRS income tax return. Provide **all of the following:**
-a copy of IRS Form 4868 "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return" that was filed for tax year 2015.
-a copy of the IRS's approval of an extension beyond the automatic six-month extension (if additional extension was requested) for tax year 2015.
-Verification of Non-Filing Letter (if the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after 10/1/2016.
-a copy of IRS form W-2 for each source of employment income received for tax year 2015 and, if self-employed, a signed statement certifying the amount of the individuals Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2015.
*additional information may be requested if there is insufficient data to complete verification.

____ Individual filed an **amended IRS income tax return** for tax year 2015. Provide a **2015 IRS Tax Return Transcript** that includes information from the original tax return OR any other IRS tax transcript that includes all income and tax information from the original tax return required for verification**; and** a signed copy of the 2015 IRS Form 1040X "Amended U.S. Individual Income Tax Return" that was filed with the IRS.

____ A victim of **IRS Tax-Related identity theft** who is not able to use the IRS DRT. Provide a **2015 IRS Tax Return DataBase View** (TRDBV) or any other IRS tax transcipt that includes all of the income and tax information required to be verified; **and** a signed and dated statement from the tax filer indicating that you were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft. Contact the IRS Identity Protection Specialized Unit (IPSU) at 1-800-908-4490 to request the TRDBV.

Certification and Signature (REQUIRED)

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FASFA must sign and date.

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

_____
Student (Required) Date

_____
Parent (Required for Dependent Students only) Date

Return this completed and signed worksheet to:
Roberts Wesleyan College Student Financial Services 2301 Westside Drive Rochester, NY 14624 4/17
E-mail: finaid@roberts.edu, Fax: (585)594-6036, Phone: (585)594-6150.