

2017-2018 Verification Worksheet – Dependent Student

Contact Information
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410-704-4236

Because your application was selected for a federal process called “Verification,” we must review the accuracy of your FAFSA data.

A. Student Data

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Towson ID Number (Required)</i>
<i>Address (include apt. #)</i>		<i>Phone Number (include area code)</i>	
<i>City</i>	<i>State</i>	<i>Zip Code</i>	

B. Parent Household Data

- 1) **Marital Status of Your Legal Parents:**
- ☐ **Married or Remarried** (including stepparents)
☐ **Divorced or Separated & Living Apart**
☐ **Unmarried and Both Parents Living Together** including divorced, separated, and never married parents.
 (Only choose this option if your parent is living with someone that s/he is not currently married to, and that person is your biological or legal parent as defined by the laws in your state.)

☐ **Single Parent/ Never Married**
☐ **Widowed**

2) **List all the people in your parents’ financial household from July 1, 2017 to June 30, 2018.**

- Include yourself & your parent(s) as defined above. If your parent is remarried, you must include your stepparent’s data.
- Include your parents’ other children if your parent(s) will provide more than half of their support from **July 1, 2017 to June 30, 2018**, or if the children would be required to provide your parents’ information if they were completing a **2017-2018 FAFSA**. Include children who meet either of these standards, even if they do not live with your parent(s) or are too young to attend college.
- Only include other people if they will live with your parent(s) and will receive more than half of their financial support from them from **July 1, 2017 through June 30, 2018**.

Complete all columns for every household member. Don’t leave “Age” or “Relationship” blank.

Example Household Members	Relationship	Full Name	Age	Will they attend college at least half-time?	If yes, list College Name Don’t list “Undecided” ²
Father/ Mother/ Stepparent				Not Applicable	See F.A.Q. #6 on page 4.
				Not Applicable	See F.A.Q. #6 on page 4.
TU Student	Self			Not Applicable	Towson University
List your parents’ children or dependents who meet the criteria above				<input type="checkbox"/> Yes ¹ <input type="checkbox"/> No	
				<input type="checkbox"/> Yes ¹ <input type="checkbox"/> No	
				<input type="checkbox"/> Yes ¹ <input type="checkbox"/> No	
				<input type="checkbox"/> Yes ¹ <input type="checkbox"/> No	
				<input type="checkbox"/> Yes ¹ <input type="checkbox"/> No	

¹ Only check “Yes” for college if they will be seeking a degree or certificate and attending at least half-time between **7/1/2017 and 6/30/2018**.

² If they are **undecided** about which college they will attend, please list the names of ALL the colleges they are considering at the bottom of this page or on an attached separate sheet with your name and TU ID number.

C. Income Verification

- 1) **You must report your 2015 income data below.** Do NOT provide your 2016 data. (The 2017-18 FAFSA requires 2015 data.)
- 2) **Choose one 2015 Tax Filing Status for the student and one status for the parent(s).**
- 3) Then submit the **Required Documentation**. Follow the **Documentation Instructions** on the next page.

Choose 1 for Student	Choose 1 for Parent(s)*	2015 Tax Filing Status	Required Documentation
<input type="checkbox"/>	<input type="checkbox"/>	I filed a 2015 Federal Tax Return	<input type="checkbox"/> IRS Data Retrieval Tool or IRS " Tax Return " Transcript
<input type="checkbox"/>	<input type="checkbox"/>	I filed an Amended Federal Tax Return (1040X)	<input type="checkbox"/> IRS " Tax Return " Transcript <input type="checkbox"/> and copy of your 1040X - Amended Return
<input type="checkbox"/>	<input type="checkbox"/>	I filed a Federal Tax Return with IRA or pension investment distribution rollovers	<input type="checkbox"/> IRS " Tax Return " Transcript <input type="checkbox"/> and copy of your 1099R Rollover Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> I filed a Foreign Tax Return <input type="checkbox"/> I filed a US Tax Return and a Foreign Tax Return	<input type="checkbox"/> Foreign Tax Return <input type="checkbox"/> If both, and IRS " Tax Return " Transcript
<input type="checkbox"/>	<input type="checkbox"/>	I did not file a 2015 tax return, and I did not have any 2015 income.	<input type="checkbox"/> IRS " Verification of Non-filing Letter "
<input type="checkbox"/>	<input type="checkbox"/>	I did not file a 2015 tax return, but I did have 2015 income	<input type="checkbox"/> IRS " Verification of Non-filing Letter " <input type="checkbox"/> and W2 forms from ALL of your employers <input type="checkbox"/> and complete earnings table below

	2015 Earnings	Name of Employer	Attach W2 or explain why it is not available
Student	\$		<input type="checkbox"/>
	\$		<input type="checkbox"/>
	\$		<input type="checkbox"/>
Father	\$		<input type="checkbox"/>
	\$		<input type="checkbox"/>
Mother	\$		<input type="checkbox"/>
	\$		<input type="checkbox"/>

To review the IRS tax filing requirements visit www.irs.gov/publications/p501

*If the parents listed on page 1 did NOT file a joint tax return, please check here ☐ and choose an option for EACH parent.

D. Document Checklist & Certification Statement

- ☐ Write your **name** and **TU ID** on the top of **this page** and on **all attached documents**.
- ☐ **You must submit all the Required Documentation from Section C above.**
 - ☐ To avoid a **\$150** late payment fee, **please carefully follow the Documentation Instructions** on the next page.
 - ☐ Do **NOT** submit copies or originals of your **IRS Tax Return Forms** (1040EZ, 1040, or 1040A).
 - ☐ To complete the IRS Data Retrieval Process, you must **return** to the FAFSA website at www.fafsa.gov.

By signing this worksheet, I certify that all the information reported on this worksheet is complete and correct.

I understand that if I purposely give false or misleading information on this form, I may be fined, sentenced to jail, or both.

Student Signature _____

Date _____

Parent Signature _____

Date _____

E. Documentation Instructions

Report the Correct Income Year

- You must report your **income data** based on the **2015** tax year.
- In Section B, your **“Parent Household Data”** must be based on the 2017-18 academic year (**July 1st 2017 – June 30th 2018**).

IRS Data Retrieval Tool - This is the **easiest** and **fastest** way to submit tax documentation for tax-filers!

- Log into your FAFSA record at www.fafsa.gov
- Select **“Make FAFSA Corrections.”**
- Go to the **“Financial Information”** section.
- Complete the **IRS Data Retrieval** process. (This step uploads your official tax data to a pending FAFSA correction.)
- Complete the **“Sign and Submit”** page to submit your pending FAFSA corrections to the FAFSA processor.
- For further assistance, call 1-800-4FED-AID and say **“Customer Service.”**

Ordering “Tax Return Transcripts” from the IRS

Tax-filers who can't use the Data Retrieval Tool, submitted an amended tax return, or have rollovers must submit a Tax Transcript.

- Go to www.irs.gov/transcript or call 1-800-908-9946
- Request a **“Tax Return Transcript”** or a **“Verification of Non-filing Letter.”**
- If your parents are married but filed separate returns, you must submit transcripts for **both** of your parents.

If you have trouble requesting a transcript, try entering your address exactly as it was listed on your tax return or enter your address at https://tools.usps.com/go/ZipLookupAction_input to get your “standardized” address based on USPS road abbreviations, etc.

Ordering “Verification of Non-Filing Letters” from the IRS

Most non-filers will need to submit IRS form 4506-T (www.irs.gov/pub/irs-pdf/f4506t.pdf).

- Leave line 5 blank, check box 7 - Verification of Non-Filing. For question 9, enter “12/31/2015.”
- After you receive the letter from the IRS, write the student name and TU ID on the form and submit it to our office.

Some non-filers may be able to request their letters using the faster **“Get Transcript Online”** option www.irs.gov/transcript, but most non-filers will **NOT be able to use** the 800 number or the online “Get Transcript by Mail” option.

Amended Tax Returns - Required if you or either parent filed an amendment to your original tax return

- Request a **“Tax Return Transcript”** from the IRS following the steps listed above.
- Submit a **signed** copy of your **1040X Amended Tax Return**.

Tax Returns with Rollovers - Required if you or your parent(s) tax return includes IRA or pension investment rollovers

If you are not sure if you had a rollover, see IRS 1040 (lines 15a-15b or 16a-16b) or 1040A (lines 11a-11b or 12a- 12b.)

- Request a **“Tax Return Transcript”** from the IRS following the steps listed above.
- Submit a copy of your **IRS 1099-R**

Foreign Tax Returns - Required if you or either parent filed a foreign tax return

- Submit a copy of the **foreign tax return** and, if applicable, an English translation.
- If you/your parent also filed a U.S. tax return, also submit an **IRS “Tax Return Transcript.”** Follow the steps above.

F. Choose One Method to Submit Documents

Mail or	Fax or	In Person
Towson University Financial Aid 8000 York Road Towson, MD 21252-0001	410-704-2584	Enrollment Services Center Room 339 Monday – Thursday 8:00 – 5:00 Friday 8:00 – 4:30

Please do not submit forms by email.

Please do not call to confirm receipt of faxes.

- Please wait at least 2 business days.
- Then check your online To-Do-List.

G. Frequently Asked Questions

Disclosure Policy

1) Can your office discuss students' aid records with parents or others?

Federal law requires student authorization before we can discuss aid data with parents or others. To grant authorization, please complete our authorization form, which can be found online at: www.towson.edu/aidforms

Section B - Financial Household Data

2) Should I include myself in Section B if I don't live with my parents?

Yes, always include yourself (the student) in Section B.

3) Do I need to include my stepparent in Section B?

Yes. Federal regulations insist that you include your parent's current spouse and his/her financial data on this form and your FAFSA unless your parent is separated from that parent and they are no longer living together in the same house/apartment/condo/dwelling etc.

4) How should a parent complete this worksheet if s/he is separated, but not divorced?

- If you (the parent) are still living in the same house/apartment/condo/dwelling/etc. with your spouse, check “**Unmarried but living together,**” and you must include both parents in Section B.2 and must provide financial data for both parents.
- If “**Divorced or Separated and living apart,**” check that box in Section B.2 and do not include your spouse/other parent in that household table. If you still filed a joint tax return with your spouse, you must submit a “**Tax Return**” Transcript and copies of your **2015 W-2 forms** from all of your employers.

5) How can we report parent enrollment in college?

You cannot use this worksheet to report parent enrollment in college. If your parent will be attending college **full-time**, please submit a “**Parent In College**” form, which can be obtained on-line at www.towson.edu/aidforms.

Section C - Income Verification

6) Do I need to provide my 2016 income or tax information when it's ready?

No! The FAFSA process has changed starting with the 2017-18 aid year. The revised process will only require your Prior-Prior Year income from the 2015 tax year. All financial aid is based on “prior-prior” year income information which is 2015 income.

You will not need to provide any 2016 income data until you submit your **2018-19 FAFSA**.

7) If I already provided 2015 tax information in a prior year, do I need to submit it again?

If you are eligible to use the FAFSA IRS Data Retrieval Tool for 2017-18, you must login to your 2017-18 FAFSA and use the Data Retrieval Tool to confirm the accuracy of your 2017-18 data even if you previously completed that process for 2016-17.

If you are unable to use the IRS Data Retrieval Tool for 2017-18 and have submitted a copy of your 2015 tax transcript in a prior year, you do **not** need to resubmit the transcript.

G. Frequently Asked Questions

Continued

8) What conditions make tax filers ineligible to use the FAFSA IRS Data Retrieval Tool?

- Parents filed separately.
- Change in marital status after end of tax year.
- Married, but you or your spouse filed as head of household.
- Filed a Puerto Rican or Foreign tax return.
- Do not have a valid Social Security number.

9) If I did not file a 2015 federal tax return, do I need to complete Section C?

Yes, all students and parents must complete Section C.

- Please check one box for yourself and one for your parent(s).
- If you didn't file 2015 taxes, but had any 2015 earnings, you must also complete the earnings table in Section C.
- All non-tax filers must also submit a **"Verification of Non-filing Letter."**

Follow the instructions on page 3 for "Ordering "Verification of Non-Filing Letters" from the IRS."

10) What if I am unable to get a tax transcript due to an Identity Theft issue?

Please contact the **IRS Identity Protection Specialized Unit (IPSU)** at **1-800-908-4490** and request an **"Alternate Tax Return Transcript"** also known as a **TRDBV (Tax Return Data Base View Transcript)**.

Please submit the following items to our office:

- **TRDBV Transcript** from the IRS
- A statement signed and dated by the tax filer indicating that they were victims of IRS tax-related identify theft and that the IRS has been made aware of the tax-related identity theft.