



# 2019–2020 V5 Dependent Verification Worksheet

Your 2019–2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

## A. Student's Information

\_\_\_\_\_  
Student's Last Name      First Name      M.I.

\_\_\_\_\_  
Student's Social Security Number/Student ID Number

\_\_\_\_\_  
Student's Street Address (include apt. no.)

\_\_\_\_\_  
Student's Date of Birth

\_\_\_\_\_  
City                      State                      Zip Code

\_\_\_\_\_  
Student's Email Address

\_\_\_\_\_  
Student's Home Phone Number (include area code)

\_\_\_\_\_  
Student's Alternate or Cell Phone Number

## B. Dependent Student's Family Information

List below the people in the parents' household. Household Includes:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of their support from July 1, 2019, through June 30, 2020, or if the other children would be required to provide parental information if they were completing a FAFSA for 2019–2020. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2020.

For any household member, excluding the parents, who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2019, and June 30, 2020, include the name of the college.

*If more space is needed, provide a separate page with the student's name and ID number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>	<i>Athens State University</i>	

**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 is inaccurate.**

### C. Dependent Student’s Income Information to be verified

**Important Note: The student will only fill out either #1 or #2 of Section C. Please read the instructions carefully.**

#### 1. TAX RETURN FILERS - The instructions below apply to the student.

**Instructions:** Complete this section if the student filed or will file a 2017 IRS income tax return(s). *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 [FAFSA.gov](http://FAFSA.gov).*

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student’s FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2017 IRS income tax return information into the student’s FAFSA once the 2017 IRS income tax return has been filed.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a 2017 IRS Tax Return Transcript(s).

A 2017 IRS Tax Return Transcript may be obtained through the:

- Get Transcript ONLINE – Go to [www.irs.gov](http://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."
- Get Transcript by MAIL - Online Request – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click "Get a Tax Transcript." Make sure to request the "**IRS Tax Return Transcript**" and NOT the "IRS Tax Account Transcript."
- Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

#### 2. TAX RETURN NONFILERS - The instructions and certifications below apply to the student.

**Instructions:** Complete this section if the student will not file and is not required to file a 2017 income tax return with the IRS.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2017.
- The student was employed in 2017 and has listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. [Provide copies of all 2017 IRS W-2 forms issued to the student and spouse 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.*

	2017 Amount Earned	
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
	<i>Total Amount of Income Earned from Work:</i>	<i>\$</i>

**Note: We may require you to provide documentation from the IRS that indicates a 2017 IRS income tax return was not filed with the IRS.**

### D. Parent’s Income Information to Be Verified

**Important Note: The parent(s) will only fill out either #1 or #2 of Section C. Please read the instructions carefully.**

**1. TAX RETURN FILERS:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2017 or had a change in marital status after the end of the 2017 tax year on December 31, 2017.

**Instructions:** Complete this section if the parents filed or will file a 2017 IRS income tax return(s). *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 [FAFSA.gov](http://FAFSA.gov).*

**Check the box that applies:**

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student’s FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2017 IRS income tax return information into the student’s FAFSA once the 2017 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2017 IRS Tax Return Transcript(s)**.

A 2017 IRS Tax Return Transcript may be obtained through the:

- Get Transcript ONLINE – Go to [www.irs.gov](http://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."
- Get Transcript by MAIL - Online Request – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click "Get a Tax Transcript." Make sure to request the "**IRS Tax Return Transcript**" and NOT the "IRS Tax Account Transcript."
- Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

*If the parents filed separate 2017 IRS income tax returns, **2017 IRS Tax Return Transcripts** must be provided for each parent.*

**2. NONTAX FILERS:** The instructions and certifications below apply to each parent included in the household.

**Instructions:** Complete this section if the parents will not file and are not required to file a 2017 income tax return with the IRS.

**Check the box that applies:**

- Neither parent was employed nor had income earned from work in 2017.
- One or both parents were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. [Provide copies of all 2017 IRS W-2 forms issued to the parents 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	2017 Amount Earned	IRS W-2 Provided?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>
	<i>Total Amount of Income Earned from Work:</i>	<i>\$</i>

**Note: We may require you to provide documentation from the IRS that indicates a 2017 IRS income tax return was not filed with the IRS.**

## E. High School Completion Status

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2019–2020. Please indicate which item you have provided:

- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's high school diploma.
- A state certificate or transcript received by the student after the student passed a state-authorized examination (GED test, HiSET, TASC, or other state-authorized examination) that the state recognizes as the equivalent of a high school diploma.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If state law requires a homeschooled 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.
- If state law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.
- A copy of the "secondary school leaving certificate" or similar document for students who completed secondary education in a foreign country.
- If the student is unable to obtain the documentation listed above, please indicate here and contact the financial aid office.

## F. Verification of Other Untaxed Income for 2017

If any item does not apply, enter "N/A" for Not Applicable where a response is requested, or enter 0 in an area where an amount is requested. Answer each question below as it applies to the student and the student's parent(s) whose information is on the FAFSA.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2017, multiply that amount by the number of months in 2017 you paid or received it. If you did not pay or receive the same amount each month in 2017, add together the amounts you paid or received each month.

If more space is needed, provide a separate page with the student's name and ID number at the top.

### 1. 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 2017
<i>Total Payments to Tax-deferred Pension and Retirement Savings:</i>	\$

### 2. Housing, food, and other living allowances paid to members of 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 of Benefit Received in 2017
	<i>Total Amount of Benefits Received:</i>	\$

**3. Veterans non-education benefits**

List the total amount of veteran’s non-education benefits received in 2017. 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 Veterans Non-education Benefit	Amount of Benefit Received in 2017
<i>Total Amount of Benefits Received:</i>		\$

**4. 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 Other Untaxed Income	Amount of Other Untaxed Income Received in 2017
<i>Total Amount Received:</i>		\$

**5. Money received or paid on the student’s behalf**

List any money received or paid on the student’s behalf (e.g., payment of student’s bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2017. Include support from a parent whose information was not reported on the student’s 2019–2020 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions **unless the person is the student’s parent whose information is reported on the student’s 2019–2020 FAFSA**. Amounts paid on the student’s behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student’s parents, such as grandparents, aunts, and uncles of the student.

Purpose: e.g., Cash, Rent, Books	Amount Received in 2017	Source
<i>Total Amount Received:</i>		\$

**G. Identity and Statement of Educational Purpose** *(To Be Signed at the Institution OR in the presence of a Notary)*

**The student must appear in person at Athens State University** to verify his or her identity by presenting an unexpired, valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose found below.

**OR**

**If the student is unable to appear in person at Athens State University to verify his or her identity, the student must provide:**

- (a) A copy of the unexpired, valid government-issued photo identification (ID) that is acknowledged in the notary statement below or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose, which is provided below, must be notarized. If the notary statement appears on a separate page than the Statement of Education Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**Statement of Educational Purpose**

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 Athens State University for 2019-2020.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's Social Security Number)

**Notary's Certificate of Acknowledgement**

***To be used ONLY if student is not able to appear on campus***

State of \_\_\_\_\_

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

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

Personally appeared, \_\_\_\_\_, and proved to me  
(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of unexpired, government-issued photo ID provided)

To be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal:

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

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

### H. Certification and Signature

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

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 FAFSA must sign and date.

\_\_\_\_\_  
Print Student Name (Required)

\_\_\_\_\_  
Athens State Student ID

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

***Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records.***



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