



# West Virginia State University

## Office of Student Financial Assistance 2016–2017 Verification Worksheets V-5 Aggregate Verification Group

Your 2016–2017 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 and your parents (if you are a dependent student) reported on your FAFSA. To verify that you provided correct information we will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected, by signing this form you are giving WVSU financial aid office permission to update your FAFSA with the correct information. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid office. **Complete all sections of this form applicable to you. Incomplete forms or forms without the requested documentation will not be processed. Based on your answers we may need to request additional documentation.**

### Student’s Information

Student’s Last Name	Student’s First Name	Student’s M.I.	Student’s Social Security 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 A#

### **Dependent Student’s Family Information from July 1, 2016-June 30, 2017**

List below the people in your parent’s household including yourself, parents (stepparent), siblings, etc., even if everyone does not live in one house. List only those for whom your parents provide at least 50% of their support. Also indicate any household member (not including parents) that will be attending a college/university.

### **Independent Student’s Family Information from July 1, 2016-June 30, 2017**

List below the people in your household including yourself, spouse, children, etc., even if everyone does not live in one house. List only those for whom you provide at least 50% of their support. Also indicate any household member that will be attending a college/university.

Full Name	Age	Relationship	College Attending, if any	Will be Enrolled at Least Half Time
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>

**Parent Information (this section only needs completed by Dependent Students)**

**2015 Tax Return Transcript**

**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents are married and filed separate IRS income tax returns for 2015 or had a change in marital status after the end of the 2015 tax year on December 31, 2015.

**Instructions:** Complete this section if the parents filed or will file a 2015 IRS income tax return. *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).* In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2015 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT within 8–11 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

**Check the box that applies:**

The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2015 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 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed.

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Place the date you used the IRS DRT or plan to use the IRS DRT to upload taxes to FAFSA

The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript(s)**.

To obtain a **2015 IRS Tax Return Transcript**, go to [www.IRS.gov](http://www.IRS.gov) and click on the "Order a Return or Account Transcript" link. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Use the Social Security Number (or the IRS individual taxpayer number) and the date of birth of the first person listed on the 2015 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2015 IRS income tax return). In most cases, for electronic filers, a **2015 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2015 IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the **2014 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2015 paper IRS income tax return has been received by the IRS.

If Parents are unmarried, however live in the same household and filed separate 2015 IRS income tax returns, **2015 IRS Tax Return Transcripts** must be provided for both.

\_\_\_ Check here if a **2015 IRS Tax Return Transcript(s)** is provided.

\_\_\_ Check here if a **2015 IRS Tax Return Transcript(s)** will be provided later.

**If Parent(s) Federal Taxes will not be filed in 2015, please check the appropriate box below and complete the table.**

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2015 income tax return with the IRS.

**Check the box that applies:**

- Neither parent was employed nor had no income earned from work in 2015.  
**(Must complete a Zero Income Worksheet)**
- One or both parents were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 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	2015 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00	Yes

Note: We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.

**Student Information (all students need to complete this section)**

**2014 Tax return Transcript**

**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2015 or had a change in marital status after the end of the 2014 tax year on December 31, 2015.

**Instructions:** Complete this section if the student and spouse filed or will file a 2015 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).* In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax return filers, 2015 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT within 8–11 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

**Check the box that applies:**

The student has used the IRS DRT in *FAFSA on the Web* to transfer 2015 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 2015 IRS income tax return information into the student’s FAFSA once the 2015 IRS income tax return has been filed.

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Place the date you used the IRS DRT or plan to use the IRS DRT to upload taxes to FAFSA

The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript(s)**.

To obtain a **2015 IRS Tax Return Transcript**, go to [www.IRS.gov](http://www.IRS.gov) and click on the “Order a Return or Account Transcript” link. Make sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript.” Use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2015 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2015 IRS income tax return). In most cases, for electronic filers, a **2015 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2015 IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the **2015 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2015 paper IRS income tax return has been received by the IRS.

If the student and spouse filed separate 2015 IRS income tax returns, **2015 IRS Tax Return Transcripts** must be provided for both.

\_\_\_\_ Check here if a **2015 IRS Tax Return Transcript(s)** is provided.

\_\_\_\_ Check here if a **2015 IRS Tax Return Transcript(s)** will be provided later.

**If Students Federal Taxes will not be filed in 2015, please check the appropriate box below and complete the table.**

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2015 income tax return with the IRS.

**Check the box that applies:**

- The student and /or spouse were not employed and had no income earned from work in 2015. **(Must complete a Zero Income Worksheet)**
- The student and/or spouse were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 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.

Employer’s Name	2014 Amount Earned	IRS W-2 Provided?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

Note: We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.

**Additional Information may be needed:**

**If you, parent, or spouse paid child support any time during 2015 and listed it on your 2016-2017 FAFSA, please complete a Child Support Paid Form.**

**If you or parent or your spouse received SNAP benefits (formerly known as food stamps program) anytime during 2015 calendar year and listed it on your FAFSA, please complete a SNAP Form.**

**\*\*\*Not submitting the additional required forms will delay the processing of your paperwork.**

**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 2016–2017:

- A copy of the student’s high school diploma.
- 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 General Educational Development (GED) certificate or GED transcript.
- 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 homeschooled setting.
- Documentation from the Board of Education or County that Diploma was earned.

**\*\*If the student is unable to obtain the documentation listed above, he or she must contact the Financial Aid office.**

## Certification and Signatures

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

Each person signing this worksheet certifies that all of the Information reported on it is complete and correct.

Student's Signature	Date
Parent's Signature (Dependent student)	Date
Spouse's Signature (If Independent and married)	Date

*Return to: West Virginia State University, Financial Aid, P.O. Box 1000, Rm 125, Institute, WV 25112*

**West Virginia State University  
Student Financial Assistance  
2016-2017 Identity/Statement of Educational Purpose**

**Identity and Statement of Educational Purpose  
(To Be Signed at the Institution)**

The student must appear in person at \_\_\_\_\_ to  
(Name of Postsecondary Educational Institution)

verify his or her identity by presenting a 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 by the institution with the date it was received and reviewed 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 following English or Spanish Statement:

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

*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.

(Name of Postsecondary Educational Institution)

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

\_\_\_\_\_  
(Student's ID Number)

**West Virginia State University  
Student Financial Assistance  
2016-2017 Identity and Statement of Educational Purpose**

**Identity and Statement of Educational Purpose  
(To Be Signed With Notary)**

If the student is unable to appear in person at \_\_\_\_\_  
(Name of Postsecondary Educational Institution)  
to verify his or her identity, the student must provide:

- (a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as, but not limited to a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose (in English or Spanish) provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)  
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.  
(Name of Postsecondary Educational Institution)

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

\_\_\_\_\_  
(Student's ID Number)

**Notary's Certificate of Acknowledgement**

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 government-issued photo ID provided)

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

**WITNESS my hand and official seal**

(seal)

\_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_

(Date)