

# Verification Worksheet (V5)

## Dependent Student 2018-19



Your FAFSA was selected for review in a process called "verification." Federal law requires that Anderson University compare your reported FAFSA data to the tax information you and your parent(s) provided the Internal Revenue Service (IRS) for 2016. The preferred method is for you to import the tax data from your 2016 tax return using the IRS Data Retrieval Tool (DRT) and resubmit your FAFSA without changing the imported data. It may be necessary for you to provide additional information to satisfy verification requirements.

No further action can be taken on your request for financial aid including all federal, state, or need-based university funds until you submit the required information and complete this process.

If there are differences between your FAFSA data and the verification documents, Anderson University will make corrections electronically. Your financial aid awards may be adjusted as a result of the correction process.

### A. Student Information

New Student  Returning Student

Last name _____	First name _____ M.I. _____
Student ID _____	Student SSN _____ - _____ - _____
Street address _____	Date of birth _____
City _____	State _____ ZIP code _____
Student's daytime phone number _____	Parent's daytime phone number _____
Student's email address _____	Parent's email address _____

### B. Number in Household - *determine which parent(s) to include as members of your household in Section C (below).*

- If your legal parents (biological and/or adoptive) are both living and married to each other then list both of them on the verification worksheet.
- If your legal parents are divorced (or separated) list the parent you lived with more during the past 12 months. If this parent has remarried, list that parent and the person he or she married (your stepparent).
- If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the last 12 months or during the most recent year that you actually received support from a parent.
- If your legal parents are not married to each other but live together select "unmarried / both parents live together" and list both of them regardless of their gender.
- If one of your parents has died list the surviving parent. If the surviving parent is remarried, list both the surviving parent and the person he or she married (your stepparent).
- Do not include any person who is not married to your parent and who is not a legal or biological parent.
- A couple doesn't have to be legally separated to be considered divorced/separated for FAFSA purposes; they may consider themselves separated when one has permanently left the household.
- A stepparent is treated the same as a biological parent if the stepparent is married to the biological parent whose information is reported on the FAFSA. There are no exceptions.
- Being claimed as a dependent on a parent's tax return is NOT relevant when answering FAFSA questions.

### C. Number in Household / Number in College - *Please list in the table below all the people living in your parents' household.*

- Include yourself.
- Include your parent(s).
- Include other siblings and other persons (like a grandparent) who live in your parent(s) household if your parent(s) will provide more than half of their financial support from July 1, 2018, through June 30, 2019.

**IMPORTANT:** If any member of your household will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution between July 1, 2018 and June 30, 2019, please include the name of the college they will attend.

Full Name	Age	Relationship to Student	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>		
		<i>Parent(s)</i>		

(over)

**Anderson University Office of Student Financial Services — Verification Worksheet (Dependent Student)**

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**D. Tax Filers**

Complete Section D if the student or parents have filed or will file a 2016 IRS income tax return. The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of *FAFSA on the Web*. In most cases, no further documentation is needed to verify 2016 income information IF you transfer the data into the student’s FAFSA using the Data Retrieval Tool AND you do not make any changes to the imported information. Please resubmit your FAFSA once the Tool has been used.

*Please check all that apply.*

- The parent(s)  The student has used the Data Retrieval Tool in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student’s FAFSA.
- The parent(s)  The student has not yet used the Data Retrieval Tool in *FAFSA on the Web*, but will use the Tool to transfer 2016 IRS income tax return information into the student’s FAFSA within 2-3 weeks after e-filing.
- The parent(s)  The student is unable or choose not to use the Data Retrieval Tool in *FAFSA on the Web*, and instead will provide Anderson University a 2016 IRS Tax Return Transcript.
- The parents filed separate 2016 IRS income tax returns, and each parent will provide their own 2016 IRS Tax Return Transcript, since using the Data Retrieval Tool is not an option.

For helpful details on when and how to use the IRS Data Retrieval Tool and options for requesting an IRS Tax Return Transcript visit the AU website <http://www.anderson.edu/finaid/verification>. In most cases the IRS makes tax return information available for the Data Retrieval Tool and the Tax Return Transcript within 2–3 weeks after accepting your e-filed tax return.

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**E. Nontax Filers**

Complete Section E if the student or parent(s) will not file and are not required to file a 2016 income tax return with the IRS.

*Please check all that apply*

- The parent(s)  The student was not employed and had no income earned from work in 2016.
- The parent(s)  The student was employed in 2016, and either:
  - will provide copies of all W-2’s they received from each employer, or
  - if W-2’s were not issued, list below all sources and amounts of income you earned from working in 2016.

Your Full Name	Employer’s Name	Annual Amount
a.	a.	\$
b.	b.	\$
c.	c.	\$
d.	d.	\$

**NEW for 2018–2019!**

If you are the parent of a dependent student, submit an IRS Verification of Nonfiling Letter. The federal government now requires the parents of dependent students who filed a FAFSA to have the IRS verify if no tax return was filed. If you fit this category and did not file a 2016 tax return, you must request a Verification of Nonfiling Letter from the IRS and submit the nonfiling letter as part of your financial aid application materials. For more information on nonfiling letters, see the [IRS Transcript Types Web page](#).

**DO NOT list AU as a third-party recipient** when requesting your nonfiling letter. You should have the IRS send the document directly to you; then you should submit a copy to Student Financial Services.

**Dependent students who did not file** a 2016 tax return do **NOT** have to submit an IRS Verification of Nonfiling Letter.

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**F. High School Completion Status**

Please provide one of the following documents that indicate the student’s high school completion status when the student will begin college in the 2018–2019 school year.

- 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 homeschool setting.

If the student is unable to obtain the documentation listed above, he or she must contact the Office of Student Financial Services.

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### G. Confirm Your Identity

The student must appear in person at Anderson University to verify his or her identity by presenting one of these forms of government-issued photo identification:

- Driver's License
- Passport
- Other State-issued ID

Anderson University will maintain a copy of the student's photo ID and annotate the date it was presented and the name of the Student Financial Services representative who collected and verified the student's identity.

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### H. Statement of Educational Purpose

Students must sign a *Statement of Educational Purpose* that certifies who they are and that the federal student aid they may receive will only be used for educational purposes and for the cost of attending Anderson University for the 2018–2019 academic year.

#### 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 Anderson University for 2018-2019.

\_\_\_\_\_

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

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Student's ID Number*

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### I. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and accurate. The student must sign and date. Also, one parent must sign and date if the student is a dependent student who reported the parent's information on the FAFSA.

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

\_\_\_\_\_  
*Print Student's Name*

\_\_\_\_\_  
*Student's ID Number*

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

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Print Parent's Name*

\_\_\_\_\_  
*Parent's Signature (required for Dependent Students)*

\_\_\_\_\_  
*Date*

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### J. Inability to appear in person

If a student is enrolled in distance education courses and is not able to appear at Anderson University in person, they must go to a notary public. The Department of Education does not authorize the use of online notary services as an alternative to traditional, in-person notary services.

The notary will act on behalf of the university. The student must provide Anderson University with an ORIGINAL, notarized signed copy of their personal identification and an ORIGINAL, notarized "wet" copy of the *Statement of Educational Purpose*.

Scanned or faxed copies of the personal identification and/or *Statement of Educational Purpose* cannot be accepted. Both documents must be received by U.S. mail and contain ORIGINAL signatures. Please allow for additional processing time if you are unable to appear in person and must use a notary.