

Student Last Name: _____

First Name: _____

Student ID:

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Phone Number: _____

2017-2018 Verification Form

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The verification process, requires that The University of Utah compare information from your FAFSA with copies of 2015 Federal Tax Return transcripts, W-2 forms or other financial documents. If there are differences between your FAFSA information and your verification documents provided, the University Office of Scholarships and Financial Aid may make corrections to your FAFSA using the information provided in the verification process. The University of Utah must also verify your high school completion status and identity/statement of educational purpose.

This form must be **completed in blue or black ink**. Any verification documents with missing or incomplete information cannot be processed. An email notification will be sent to your UMail address requesting corrections be made. Resubmit a corrected form or additional information as soon as possible to avoid delay in approval of your financial aid. Please understand that processing time may vary, and allow approximately 2-3 weeks in processing time from the date when all information is submitted.

A – PARENT HOUSEHOLD INFORMATION

Include in the household:

- Yourself and your parent(s) (**including stepparent**) and
- Your sibling(s)/stepsibling(s), even if they don't live with your parent(s), if
 - (A) Your parent(s) provide more than half of their support from July 1, 2017 through June 30, 2018, or
 - (B) Any of the children would be required to report your parent(s) information on the FAFSA; and
- Other people, if they now live with your parents and your parents provide more than half of their support, and will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.

Include in college:

- Yourself, as indicated;
- Other members of your parents' household, **if they will attend at least half time in 2017-2018 academic year**, and they are in a program that leads to a college degree or certificate.
- In college does **not** include household members who are in high school and are registered in a concurrent enrollment program.

Read all of Section A above to determine who to list in your household below

FULL NAMES OF THOSE IN HOUSEHOLD <i>(Your <u>parent(s)</u> should be listed in the household)</i>	DATE OF BIRTH <i>(Month/Year)</i>	RELATIONSHIP TO STUDENT	COLLEGE <i>(if attending)</i>	WILL BE ENROLLED AT LEAST HALF TIME <i>(if attending college)</i>	
1.		SELF	UNIVERSITY OF UTAH	<input type="checkbox"/> YES	<input type="checkbox"/> NO
2.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
3.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
4.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
5.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
6.				<input type="checkbox"/> YES	<input type="checkbox"/> NO

Check here, if there are more than six family members. Attach a list with each family member's name, age, relationship, college (if enrolled), and if they will be enrolled at least half time.

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B – INCOME INFORMATION Please submit student and parent(s) income by following the directions below:

1. **Tax filer:** Update tax information on the FAFSA through the **IRS Data Retrieval Tool (DRT)** if you have not already done so. If you are ineligible to use the IRS Data Retrieval Tool (DRT) then you may submit a **2015 IRS Tax Return Transcript**. To obtain a free IRS Tax Return Transcript, go to www.irs.gov and click on the “Get a tax transcript” link under the Tools section or call 1-800-908-9946. If you have problems obtaining an IRS Tax Return Transcript, please call 1-800-829-1040 for assistance.

Please check the applicable box below of how you will confirm your income information:

- Parent:**
- I have used the Data Retrieval Tool on the FAFSA to report income information. **Date completed:** _____
 - I will use the Data Retrieval Tool on the FAFSA to report income information and notify your office when complete.
 - I am not eligible to use the Data Retrieval Tool and will use other means as indicated to document income information.

- Student:**
- I have used the Data Retrieval Tool on the FAFSA to report income information. **Date completed:** _____
 - I will use the Data Retrieval Tool on the FAFSA to report income information and notify your office when complete.
 - I am not eligible to use the Data Retrieval Tool and will use other means as indicated to document income information.

2. **Non-Tax filer:** Complete part a and b if you and/or your parent(s) will not file and are not required to file a 2015 income tax return with the IRS. You may be asked to provide additional documentation of how the household is supported.

- a) If you or your parent(s) were employed but are not required by the IRS to report your 2015 taxes, you must specify the employer name, the amount earned in 2015 and include a copy of W-2 forms (if provided by employer) for your verification. See the Verification Guide Sheet for filing requirements. If you or your parents were not employed, mark the box below.

Name (First and Last)	Student /Parent	Employer Name	W-2? Yes/No	2015 Amount Earned	Did not work in 2015
1.	Student				<input type="checkbox"/>
2.					<input type="checkbox"/>
3.					<input type="checkbox"/>

Check here, if more space is needed. Attach a separate page with the student’s name and ID number at the top.

- b) **All non-tax filers must provide verification of non-filing through the IRS dated on or after October 1, 2016.** There are two different ways you can provide this documentation. 1) Fax or mail the IRS Form 4506-T (Request for Transcript of Tax Return) to the IRS and check box 7 for Verification of Non-filing. You can download this form at the IRS website. 2) You may also order a Verification of Non-Filing Letter from the IRS by calling them at 1-800-829-1040.

- I have attached IRS Verification of Non-Filing
- I will provide IRS Verification of Non-Filing

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C – HIGH SCHOOL COMPLETION STATUS


For FAFSA verification purposes, **please attach** one of the following items to document successful completion of high school or the equivalent of a high school diploma:

<input type="checkbox"/>	<p>High School Diploma - Acceptable documentation includes:</p> <p>(a) A copy of the applicant’s high school diploma; or</p> <p>(b) A copy of the applicant’s final high school transcript that shows the date when the applicant completed secondary school education.</p> <p><i>Note: In cases where a copy of an applicant’s high school diploma or final high school transcript is unavailable, e.g., the school is closed or located in a foreign country and the records are not available, an institution may accept alternative documentation to verify the applicant’s high school completion status such as Secondary School Leaving Certificate from the student’s national education ministry.</i></p>
<input type="checkbox"/>	<p>Recognized Equivalent of a High School Diploma - Acceptable documentation includes:</p> <p>(a) General Educational Development (GED) Certificate;</p> <p>(b) A State certificate received by a student after the student has passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma;</p> <p>(c) An academic transcript of a student who has successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree; or</p> <p>(d) For a person who is seeking enrollment in an educational program that leads to at least an associate degree or its equivalent and has not completed high school but has excelled academically in high school, documentation from the high school that the student excelled academically in high school and documentation from the postsecondary institution that the student has met the formalized, written policies of the postsecondary institution for admitting such students.</p>
<input type="checkbox"/>	<p>Homeschool - Acceptable documentation includes:</p> <p>(a) A transcript or the equivalent, signed by the parent or guardian, that lists the secondary school courses completed by the applicant and documents the successful completion of a secondary school education; or</p> <p>(b) A secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent) provided for under State law.</p> <p>Please list the state in which you were homeschooled: _____</p>

D – CERTIFICATION AND SIGNATURES (This form may not be electronically signed)

STUDENT SIGNATURE: _____ DATE: _____

PARENT SIGNATURE: _____ DATE: _____

 **You MUST sign and date this form. Your signature indicates that all information provided on this form is correct, and any requested documents will be provided to verify the reported amounts. Warning: if you purposely give false or misleading information on this worksheet you may be fined, sentenced to jail, or both.**

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Only use this page if you are going to sign this form in person at the University Office of Scholarships and Financial Aid. If you cannot sign this form in person, complete Section D on page 3 to be signed in the presence of a notary.

E – IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE - In Person

The student must appear in person at the University Office of Scholarships and Financial Aid to 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 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 a Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I, _____ am the individual signing this Statement of Educational Purpose
(Print Student’s Name)

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending the University of Utah for 2017-2018.

(Student’s Signature) (Date)

Name of Official at the Institution Accepting Form

(Official’s Signature) (Date)

Group 5 Verification Guide Sheet – Dependent

What you must do to complete verification:

- 1. Complete Sections A through D (student and parent(s))
- 2. Submit income information as outlined in section B (student and parent(s))
- 3. Verify identity and Statement of Educational Purpose with Section E or F (student)

Section A – Parent Household Information:

Who is considered a parent?

A dependent student's FAFSA must include income and other information about both of the student's legal parents (biological or adoptive) if the parents are living together, regardless of the parents' marital status or gender. In order to correctly fill out Section A please note how "parent" is defined within the federal financial aid context:

- If your parents are both living and married to each other, give an account of their combined household and income information.
- If your parents have divorced or separated, give an account of the household and income information of that parent with whom you lived most during the past 12 months. If you did not live with one parent more than the other, answer in terms of the parent who provided the most financial support during the past 12 months.
- If your widowed or divorced parent has remarried as of when you submit your documentation for verification, give an account of the household and income information, which includes both your parent and the person whom he/she has married.
- If your parent is widowed or single, give an account of his/her household and income information.

Section B – Income Information:

1. Tax Filer

Acceptable tax forms for verification are the 2015 IRS Tax Return Transcript or tax information provided by the IRS through the Data Retrieval Tool available through your FAFSA. 1040 forms are not acceptable tax forms for verification.

For individuals with unusual circumstances, please contact the University Office of Scholarships and Financial Aid for instructions on documentation to submit. This includes individuals who were granted a filing extension by the IRS, filed an amended IRS income tax return, victims of IRS tax-related identity theft, and individuals who filed a non-IRS income tax return.

2. Non-Tax Filer

If you did not file 2015 taxes you must provide IRS verification of non-filing that can be obtained from the IRS. Even if you were selected for verification for the previous 2016-17 school year, a recent verification of non-filing must be obtained and dated on or after October 1, 2016.

2015 Federal Filing Requirements for Most Taxpayers

IF your filing status is ...	AND at the end of 2015 you were ...*	THEN you must file a return if your gross income was at least ...**
Single	under 65	\$10,300
	65 or older	\$11,850
Married filing jointly***	under 65 (both spouses)	\$20,600
	65 or older (one spouse)	\$21,850
	65 or older (both spouses)	\$23,100
Married filing separately	any age	\$4,000
Head of household	under 65	\$13,250
	65 or older	\$14,800
Qualifying widow(er) with dependent child	under 65	\$16,600
	65 or older	\$17,850

*If you were born before January 1, 1950, you are considered to be 65 or older at the end of 2015.

** **Gross income** means all income you received in the form of money, goods, property and services that is not exempt from tax, including any income from sources outside the United States or from the sale of your main home (even if you may exclude part or all of it). **DO NOT** include social security benefits unless (a) you are married filing a separate return and lived with your spouse at any time during 2015, or (b) one-half of your social security benefits plus your other gross income and any tax-exempt interest is more than \$25,000 (\$32,000 if married filing jointly). If (a) or (b) applies, see Form 1040 or 1040A or Pub. 915 to figure taxable part of social security benefits you must include in gross income.

***If you didn't live with your spouse at the end of 2015 (or on the date your spouse died) and your gross income was at least \$3,950, you must file a return regardless of your age.