

2017-2018 IRS Income Tax Verification Guide

Your 2017-2018 Free Application for Federal Student Aid (FAFSA) has been selected for verification. **Funding is limited** and we strongly encourage you to submit all required documentation as quickly as possible. **Please include the student's name and Virginia Tech ID number on all pages submitted.**

Required Documents to complete verification

- ✓ Independent Verification Worksheet Signed by Student (**Turn in pages 2 thru 6**)
- ✓ Student and Spouse (if applicable) 2015 signed IRS Tax Return Transcripts **OR**
- ✓ Student and Spouse (if applicable) 2015 signed IRS Tax Return Form (1040, 1040A, 1040EZ) **OR**
- ✓ If student and/or spouse will not and are not required to file a tax return see instructions below
- ✓ High School Completion Status Form
- ✓ 2017-2018 Identity and Statement of Educational Purpose (**Signed in the presence of USFA Staff or Notary**)

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| Options to Provide Income Tax Documentation |
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Provide a signed copy of student and spouse IRS Tax Return Transcript:

- IRS Online Tax Return Transcript Request <https://www.irs.gov/individuals/get-transcript>
- IRS Automated Phone Transcript Service 1-800-908-9946

OR

Provide a signed copy of student and spouse 2015 IRS Tax Return Form (1040, 1040A, 1040EZ)

OR

If student and or spouse or both are not required by law to file a federal tax return you will need to provide the following for each non-filer:

1. List of earnings on page 3 of this document **AND** provide a copy of IRS Form W-2 for each source of 2015 employment income received (or an equivalent document such as the Wage and Income Transcript) Wage and Income Transcripts can be obtained at <https://www.irs.gov/individuals/get-transcript>

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2015 must provide:

1. A **2015 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
2. A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Student ID Number _____

Student Last Name _____

Student Filing Status

Order IRS Tax Transcripts by phone: 1-800-908-9946 or online at www.irs.gov

Check all that apply

- I was not employed and had \$0 income from work for 2015
- I have filed a 2015 Federal tax return and an IRS Tax Transcript or IRS tax form is attached or will be provided
- I earned income in 2015 and **will not** and **am not** required to file a Federal tax return*

*Non-Filers only complete chart below and attach copies of ALL W2's or statements of earnings received.

| Name of Employer | 2015 Amount Earned | IRS W-2 |
|------------------------------|--------------------|---------|
| <h1>For Non Filers Only</h1> | | |
| | | |
| | | |

Check all that apply (Spouse Only if Applicable)

- I was not employed and had \$0 income from work for 2015
- I have filed a 2015 Federal tax return and an IRS Tax Transcript or IRS tax form is attached or will be provided
- I earned income in 2015 and **will not** and **am not** required to file a Federal tax return*

Non-Filers only complete chart below and attach copies of ALL W2's or statements of earnings received.

| Name of Employer | 2015 Amount Earned | IRS W-2 |
|------------------------------|--------------------|---------|
| <h1>For Non Filers Only</h1> | | |
| | | |
| | | |

Please be sure all information is complete and include all signatures. **Electronic signatures are not acceptable.** Make sure the student last name and ID number are clearly indicated on the top of each page.

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

Student Signature _____

Date _____

(Please Note: Email is not always a secure method of communication and may inadvertently expose your information if misdirected. Virginia Tech suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery. If you choose to submit information through email, Virginia Tech will not be responsible for any exposure of data.)

2017-2018 High School Completion Status

Student ID Number: _____ Email: _____

Full Legal Name:

(Please print clearly)

Last

First

Middle

Please provide one of the following documents that indicate the student's high school completion status at the time the student will begin college in 2017-2018:

- 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 state certificate or transcript received by a 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.
- For students who completed secondary education in a foreign country, a copy of the
 - "Secondary School Leaving Certificate" or other similar document.
- 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.
- For a homeschooled student in a state where the law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), please provide a copy of that credential.
- For a homeschooled student in a state where the law does not require the 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 includes a statement that the student successfully completed a secondary school education in a homeschool setting.
- A copy of their Certificate of Release or Discharge from Active Duty "DD214"

If you purposely give false or misleading information, you may receive a fine, a prison sentence, or both. By signing this form, I certify that all information is complete and correct.

Student Signature _____

Date _____

Electronic signatures are not allowed

Parent Signature _____

Date _____

2017-2018
Identity and Statement of Educational Purpose
(To Be Signed at the Institution)

Student ID Number: _____ Email: _____

Student's
 Full Legal Name: _____ , _____
(Please print clearly) **Last** **First** **Middle**

The student must appear in person at Virginia Tech to verify his or her identity by presenting 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 Statement of Educational Purpose 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 Virginia Tech for 2017-2018.

Student
 Signature _____ Date _____

Student ID
 Number _____

USFA Witness Signature _____ Date _____

(Please Note: Email is not always a secure method of communication and may inadvertently expose your information if misdirected. Virginia Tech suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery. If you choose to submit information through email, Virginia Tech will not be responsible for any exposure of data.)

**Identity and Statement of Educational Purpose
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at Virginia Tech 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 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 Educational 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 (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 Virginia Tech for 2017-2018. | |
| Student Signature _____ | Date _____ |
| Student ID Number _____ | |

| Notary's Certificate of Acknowledgement (for use only if unable to appear in person) | |
|--|--|
| State of _____ | City/County of _____ |
| On _____ (Date) | before me, _____ (Notary's Name) |
| personally appeared, _____ (Printed name of signer) and provided to me 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) |