

## 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

- ✓ Dependent Verification Worksheet Signed by Student and Parent (**Turn in pages 2 & 3**)
- ✓ 2015 signed IRS Tax Return Transcripts for both Student and Parent **OR**
- ✓ Use of the FAFSA Data Retrieval Tool for both Student and Parent **OR**
- ✓ Proof of non-filing status for Student and or Parent (**see below**)
- ✓ High School Completion Status Form
- ✓ 2017-2018 Identity and Statement of Educational Purpose (**Signed in the presence of USFA Staff or Notary**)

<b>Options to Provide Income Tax Documentation</b>
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### Use the IRS Data Retrieval Tool (DRT) – preferred method:

This tool allows a direct transfer of 2015 federal tax return data from the IRS into the FAFSA. To access the DRT, return to [www.fafsa.gov](http://www.fafsa.gov). Follow the instructions to make a correction to a processed FAFSA. Go to the Financial Information section. Make sure the tax return status is "Already Complete". This will bring up filter questions and a link to the IRS website. To access the DRT the taxpayer must have filed an electronic return at least two weeks prior. The DRT is available six to eight weeks after filing a paper return. Make sure to complete all steps and transfer the data back to the FAFSA. The student and parent, if the student is dependent, must enter their Federal Student Aid ID to submit the correction.

### Provide a signed copy of 2015 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

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

1. 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 [www.irs.gov/individuals/gettranscript](http://www.irs.gov/individuals/gettranscript); **and**
2. IRS Verification of Non-filing Letter dated on or after October 1, 2016.

An IRS Verification of Non-filing Letter can be obtained online using the **IRS Get Transcript service**. If the individual cannot obtain one online for whatever reason, it must be obtained by completing and checking box 7 on the **IRS Form 4506-T, Request for Transcript of Tax Return**, and mailing it to the IRS. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

### 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.

**2017-2018  
Dependent Student Verification Worksheet**

Student's ID Number: \_\_\_\_\_ Email: \_\_\_\_\_

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

Your 2017-2018 Free Application for Federal Student Aid (FAFSA) has been selected for verification. The Office of University Scholarships and Financial Aid will compare your FAFSA with the information on this form and with any other required documents. If there are differences between your FAFSA and verification documents, we will make the corrections electronically. If necessary, our office will request additional information. Please do not make any on-line corrections to your FAFSA during this process.

**Please include the student's name and Virginia Tech ID number on all pages submitted.**

**Household information**  
Please complete all boxes for persons listed

**List the people in your parent(s)' household, including:**

- Yourself, even if you don't live with your parent(s); **AND**
- Your parent(s), if your legal parent(s) (biological and/or adoptive) are not married to each other and live together provide information about both of them regardless of their gender; **AND**
- Your parent(s) other children, even if they do not live in your parent's household, if your parent(s) will provide more than half of their support between July 1, 2017 and June 30, 2018, or the children would be required to provide parental information when applying for Federal Student Aid; **AND**
- Other people if they now live with your parent(s), your parent(s) provide more than half of their support and your parent(s) will continue to provide more than half of their support between July 1, 2017 and June 30, 2018.

Include the name of the college for any household members, excluding parent(s), 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, 2017 and June 30, 2018. Include additional pages if necessary to list each person in the household.

Full Name	Age (Do not leave blank)	Relationship to Student	College/University
1)	Age	Self	Virginia Tech
2)	Age	Parent/Stepparent	XXXXXXXXXXXXXXXXXX
3)	Age	Parent/Stepparent	XXXXXXXXXXXXXXXXXX
4)	Age		
5)	Age		
6)	Age		
7)	Age		

*Attach additional page(s) if necessary*

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](http://www.irs.gov)

**Check all that apply**

- Was not employed and had no income from work for 2015
- Has filed a 2015 Federal tax return and used the IRS Data Retrieval Tool to transfer my information to my FAFSA,
- Has filed a 2015 Federal tax return and an IRS Tax Transcript is attached or will be provided
- Has not yet filed a 2015 Federal tax return. Must provide a copy of the IRS Tax Transcript after filing or use IRS Data Retrieval
- Was employed in 2015 and **will not** and **am not** required to file a Federal tax return\*

**\*Complete chart below and attach copies of ALL W2's or statements of earnings received. If there are no earnings, please put zeroes.**

Name of Employer	2015 Amount Earned	IRS W-2

**Parent Filing Status**  
Order IRS Tax Transcripts by phone: 1-800-908-9946 or online at [www.irs.gov](http://www.irs.gov)

**Check all that apply**

- Was not employed and had no income from work for 2015  
\_\_\_\_\_ Mom or Parent 1 \_\_\_\_\_ Dad or Parent 2
- Has filed** a 2015 Federal tax return and used the IRS Data Retrieval Tool to transfer my information to my FAFSA.  
*If filing status is married filing separately, must submit IRS Transcript for both parents, CANNOT use IRS Data Retrieval Tool*  
\_\_\_\_\_ Mom or Parent 1 \_\_\_\_\_ Dad or Parent 2
- Has filed a 2015 Federal tax return and an IRS Tax Transcript is attached or will be provided.  
\_\_\_\_\_ Mom or Parent 1 \_\_\_\_\_ Dad or Parent 2
- Was employed in 2015 but **will not** & **am not** required to file a Federal tax return with the IRS.\*  
\_\_\_\_\_ Mom or Parent 1 \_\_\_\_\_ Dad or Parent 2

**\*Complete chart below and attach copies of ALL W2's or statements of earnings received. If there are no earnings, please put zeroes.**

Name of Employer	2015 Amount Earned	IRS W-2

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** \_\_\_\_\_

**Parent 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** \_\_\_\_\_  
**Electronic signatures are not allowed**

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

**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:

<b>Statement of Educational Purpose</b>	
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.

<b>Statement of Educational Purpose</b>	
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 _____	

<b>Notary's Certificate of Acknowledgement (for use only if unable to appear in person)</b>	
State of _____	City/County of _____
On _____ (Date)	before me, _____ (Notary's Name)
personally appeared, _____ and provided to me on basis of (Printed name of signer)	
satisfactory evidence of identification _____ (Type of government-issued photo ID provided)	
to be the above-named person who signed the foregoing instrument. <b>WITNESS</b> my hand and official seal (seal)	
_____ (Notary Signature)	My commission expires on _____ (Date)