2015–2016 Dependent Student Verification Worksheet

Your 2015–2016 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 reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school 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. You must complete the applicable sections and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact the Office of Financial Assistance at finaid@neumann.edu or 610-558-5521 as soon as possible.

A. Dependent Student’s Information

<table>
<thead>
<tr>
<th>Student’s Last Name</th>
<th>Student’s First Name</th>
<th>Student’s M.I.</th>
<th>Student’s Social Security Number</th>
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<tr>
<th>Student’s Street Address (include apt. no.)</th>
<th>Student’s Date of Birth</th>
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<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
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<tr>
<th>Student’s Home Phone Number (include area code)</th>
<th>Student’s Alternate or Cell Phone Number</th>
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B. List below the people in the parents’ household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn’t live with the parents.
- The parents’ other children if the parents will provide more than half of the children’s support from July 1, 2015, through June 30, 2016, or if the other children would be required to provide parental information if they were completing a FAFSA for 2015–2016. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other people’s support and will continue to provide more than half of their support through June 30, 2016.

**Number in College:** Please include in the space below information about any household member who is, or 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, 2015, and June 30, 2016, include the name of the college.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
<th>Will be Enrolled at Least Half Time (Yes or No)</th>
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**Self**

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate. If more space is needed, provide a separate page with the student’s name and ID number at the top.
### C. Verification of 2014 Income for Student

#### Student Tax Filers

Important Note: The instructions below apply to the student. Notify the financial aid office if the student filed separate IRS income tax returns for 2014 or had a change in marital status after December 31, 2014. Complete this section if the student filed or will file a 2014 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. In most cases, no further documentation is needed to verify 2014 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- [ ] The student has used the IRS DRT in FAFSA on the Web to transfer 2014 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 2014 IRS income tax return information into the student’s FAFSA once the 2014 IRS income tax return has been filed.

- [ ] The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a **2014 IRS Tax Return Transcript(s).**

A **2014 IRS Tax Return Transcript** may be obtained through the:

- **Online Request** - Go to [www.IRS.gov](http://www.IRS.gov), under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE” or “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”

- **IRS2Go App** –

- **Telephone Request** - 1-800-908-9946

- **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2014 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 or obtaining an IRS Tax Return Transcript.

- [ ] Check here if a **2014 IRS Tax Return Transcript(s) is provided.**
- [ ] Check here if a **2014 IRS Tax Return Transcript(s) will be provided later.**

#### Student Nontax Filers

The instructions and certifications below apply to the student. Complete this section if the student will not file and is **not required** to file a 2014 income tax return with the IRS.

Check the box that applies:

- [ ] The student was not employed and had no income earned from work in 2014.

- [ ] The student was employed in 2014 and has listed below the names of all employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is provided. [Provide copies of all 2014 IRS W-2 forms issued to the student by their employer(s)]. List every employer even if the employer did not issue an IRS W-2 form.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>Annual Amount Earned in 2014</th>
<th>IRS W-2 Provided?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC’s Auto Body Shop (example)</td>
<td>$4,500.00</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total Amount of Income Earned From Work</td>
<td>$</td>
<td></td>
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Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS. If more space is needed, provide a separate page with the student’s name and ID number at the top.
D. Verification of 2014 Income for Parent

Parent Tax Filers

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2014 or had a change in marital status after December 31, 2014. Complete this section if the parents filed or will file a 2014 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. In most cases, no further documentation is needed to verify 2014 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

☐ The parents have used the IRS DRT in FAFSA on the Web to transfer 2014 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 2014 IRS income tax return information into the student’s FAFSA once the 2014 IRS income tax return has been filed.

☐ The parents are unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a 2014 IRS Tax Return Transcript(s).

A 2014 IRS Tax Return Transcript may be obtained through the:

- Online Request - Go to www.IRS.gov, under the Tools heading on the IRS homepage, click “Get Transcript of Your Tax Records.” Click “Get Transcript ONLINE” or “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.”
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2014 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 or obtaining an IRS Tax Return Transcript.

If the parents filed separate 2014 IRS income tax returns, 2014 IRS Tax Return Transcripts must be provided for each.

☐ Check here if a 2014 IRS Tax Return Transcript(s) is provided.

☐ Check here if a 2014 IRS Tax Return Transcript(s) will be provided later.

Parent Nontax Filers

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 2014 income tax return with the IRS.

Check the box that applies:

☐ Neither parent was employed, and neither had income earned from work in 2014.

☐ One or both parents were employed in 2014 and have listed below the names of all employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is provided. [Provide copies of all 2014 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.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>Annual Amount Earned in 2014</th>
<th>IRS W-2 Provided?</th>
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<tr>
<td>Total Amount of Income Earned From Work</td>
<td>$</td>
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Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS. If more space is needed, provide a separate page with the student’s name and ID number at the top.
E. Receipt of SNAP Benefits – Please enter N/A if not applicable
The parents certify that ____________________________ , a member of the parents’ household, received benefits from the Supplemental Nutrition Assistance Program (SNAP) sometime during 2013 or 2014. SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433-3243).

The parents’ household includes:

- The student.
- The parents (including a stepparent) even if the student doesn’t live with the parents.
- The parents’ other children if the parents will provide more than half of the children’s support from July 1, 2015, through June 30, 2016, or if the other children would be required to provide parental information if they were completing a FAFSA for 2015–2016. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other people’s support and will continue to provide more than half of their support through June 30, 2016.

Note: If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued the SNAP benefits in 2013 or 2014.

F. Child Support Paid – Please enter N/A if not applicable
If one or both of the parents included in the household and/or the student paid child support in 2014, provide in the space below the names of the persons who paid the child support, the names of the persons to whom the child support was paid, the names and ages of the children for whom the child support was paid, and the total annual amount of child support that was paid in 2014 for each child.

<table>
<thead>
<tr>
<th>Name of Person Who Paid Child Support</th>
<th>Name of Person to Whom Child Support was Paid</th>
<th>Name of Child for Whom Support Was Paid</th>
<th>Age of Child for Whom Support Was Paid</th>
<th>Amount of Child Support Paid in 2014</th>
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Note: If more space is needed, provide a separate page that includes the student’s name and ID number at the top. If we have reason to believe that the information regarding child support paid is inaccurate, we may require additional documentation, such as:

- A signed statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks, money order receipts, or similar records of electronic payments having been made.

G. Certification and Signature
Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Print Student’s Name ____________________________  Student’s ID Number ____________________________

Student’s Signature ____________________________  Date ____________________________

Parent’s Signature ____________________________  Date ____________________________

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

Please fax this completed form to 610-558-5652 or mail to:
Neumann University
Office of Financial Assistance
One Neumann Drive, Aston PA 19014-1298

Please make a copy of this completed worksheet and all accompanying documentation for your records.
Verification of 2014 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2014 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2014;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2014; and
- A copy of IRS Form W–2 for each source of employment income received for tax year 2014 and, if self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2014.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2014, provide both of the following:

- A signed copy of the original 2014 IRS income tax return that was filed with the IRS or a 2014 IRS Tax Return Transcript; and
- A signed copy of the 2014 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of Tax Administration Identity Theft

- A victim of tax administration identity theft who is not able to obtain a 2014 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer’s identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer’s 2014 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2014 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide:
  - A signed copy of that 2014 income tax return(s); or
  - A transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer’s income and tax information required to be verified for tax year 2014.