2016-17 Independent Verification Worksheet

Your application was selected for review in a process called “verification.” In this process, Temple University will be comparing information from your FAFSA application with copies of your and your spouse’s 2015 Federal Tax Return Transcripts, W2 forms, or other financial documents. The law states we have the right to ask you for this information before awarding Federal aid. If there are differences between your FAFSA application information and your financial documents, you or Temple University may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification worksheet and submit along with all required documents to Student Financial Services (SFS) immediately, as Federal and/or University need-based aid awarded is estimated until this process is complete. Failure to complete verification in a timely manner may lead to cancellation of aid. Upon review of the documentation you submit, additional information may be required; notification of such will be made as quickly as possible and may necessitate checking your Temple email account. You will be notified if FAFSA corrections result in changes/cancellation of award(s).

1. Submit the completed 2016-2017 Independent Verification Form. Make sure the form is SIGNED by the student. This form is four-sided and needs to be filled out completely.
   - If the answer is zero or if the question does not apply to you, write “0”, do not leave blank.

2. Submit 2015 IRS Tax Return Transcript(s) and W2 forms for both student (and spouse), if filed. As per federal regulations, we can no longer accept copies of the filed federal tax return unless it is specifically requested by the SFS office.
   - You can obtain a “Federal Tax Return Transcript” by calling the IRS at 1-800-908-9946 or by visiting www.IRS.gov and clicking on the “Get a Transcript of your Tax Records” link. Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript”.
   - In most cases, a 2015 IRS Tax Return Transcript may be requested as soon as the IRS processes the tax return. Generally, applicants should receive the transcript within 5 to 10 calendar days after their request (ordering online will likely be faster than by mail or telephone).
   - 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 www.FAFSA.ed.gov.
     - If you reported information for Schedule C (Profit or Loss from Business), an IRS Tax Return Transcript will be required even with IRS Data Retrieval usage.

A. Independent 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 Temple University ID#</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student’s Street Address (include apartment number)</th>
<th>Student’s Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
<th>Student’s Phone # (include area code)/Cell</th>
</tr>
</thead>
</table>
B. Independent Student’s Family Information

List below the people in your household. Include:
- **Yourself**
- **Your spouse** (if married)
- **Your children**, if you will provide more than half of their support from July 1, 2016, through June 30, 2017, or if the children would be required to provide your information if they were completing a FAFSA for 2016–2017.
  - Include children who meet either of these standards (even if they do not live with you).
  - Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2017.

*If more space is needed, attach a separate page with the student’s name and TUID number at the top.*

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College Attending 7/1/16-6/30/17</th>
<th>Enrolled at least half-time? (Yes/No)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Self</td>
<td>Temple University</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C. Independent Student’s Income Information to Be Verified

☐ Check here if you were not married at the time you filed the FAFSA. [Complete Section D]

D. Unmarried Students  (As of the time you filed the FAFSA, even if you are now married)

1. Check only one box below. [Tax transcripts include the 2015 IRS tax return transcript from filing Form 1040, 1040A, 1040EZ, or a tax return from Puerto Rico. Tax transcripts can be obtained by calling the IRS at 1-800-908-9946, or by visiting www.IRS.gov.]
   ☐ Check here if you successfully imported 2015 IRS tax data using the IRS Data Retrieval Tool.
      - You must still submit copies of all W2 forms or other earnings statements to SFS.
   ☐ Check here if you are attaching your 2015 tax transcript and W2 form(s).
   ☐ Check here if you earned income, but did not file a 2015 Federal Income Tax Return, and have attached all 2015 W2 form(s).
      - If you did not file a 2015 Federal Income Tax Return, but earned income in 2015, you must still provide all W2 forms or other earnings statements to SFS.
   ☐ Check here if you did not earn any wages or taxable income in 2015.

E. Married Students  (As of the time you filed the FAFSA, even if you are no longer married)

☐ Check here if you successfully imported 2015 IRS tax data using the IRS Data Retrieval Tool.
   - You must still submit copies of all W2 forms or other earnings statements to SFS.
☐ Check here if you filed separately from your spouse and you are attaching 2015 tax transcripts and 2015 W2s for both of you.
☐ Check here if you and/or your spouse earned income, but did not file a 2015 Income Tax Return.
      - If you or your spouse did not file a 2015 Federal Income Tax Return, but earned income in 2015, you must still provide all W2 forms or other earnings statements to SFS.
☐ Check here if you and your spouse did not earn any wages or taxable income in 2015.
F. Additional Financial Information and Untaxed Income

Use the tables below to report annual (not monthly) amounts. If the amount is zero, or the question does not apply to you, write “0.” **Do not leave items blank.** This section is directly from the 2016-17 FAFSA.

### 2015 Additional Financial Information

<table>
<thead>
<tr>
<th>STUDENT’S &amp; SPOUSE’S (combined)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. <strong>DO NOT include</strong> Temple University scholarships or grants.</td>
</tr>
</tbody>
</table>

### 2015 Untaxed Income

<table>
<thead>
<tr>
<th>STUDENT’S &amp; SPOUSE’S (combined)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veterans non-education benefits such as Disability Death Pension or Dependency &amp; Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.</td>
</tr>
<tr>
<td>Other untaxed income not reported elsewhere on this form, such as workers’ compensation, disability, etc. Also include the Health and Savings account deduction from IRS form 1040. <strong>DO NOT include</strong> extended foster care benefits, student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on base military housing or a military housing allowance, combat pay, (if you are not a tax filer), benefits from flexible spending arrangements [e.g. cafeteria plans], foreign income exclusion or credit for federal tax on special fuels.</td>
</tr>
</tbody>
</table>

### 2015 Asset Information

<table>
<thead>
<tr>
<th>STUDENT’S &amp; SPOUSE’S (combined)</th>
</tr>
</thead>
<tbody>
<tr>
<td>As of today, what is your (and spouse’s) total current balance of cash, savings and checking accounts? <strong>DO NOT include</strong> student financial aid.</td>
</tr>
<tr>
<td>As of today, what is the net worth of your (and spouse’s) investments, including real estate? <strong>DO NOT include</strong> the home you live in or retirement accounts. Net worth means current value minus debt.</td>
</tr>
<tr>
<td>As of today, what is the net worth of your (and spouse’s) current businesses and/or investment farms? <strong>DO NOT include</strong> a family farm or family business with 100 or fewer full-time or full-time equivalent employees.</td>
</tr>
</tbody>
</table>
Student’s Name: ______________________________________________________ TUID: ________________________

G. Child Support Paid

○ DO NOT include foster care or adoption payments in this section.

During 2015 was child support PAID by any member of the household listed above?

☐ Yes *
☐ No

*If yes:

Name of household member who PAID child support: ____________________________

Amount of child support PAID by household member in 2015: $__________________________

Name of person to whom child support was PAID: ________________________________

Name of child(ren) for whom child support was PAID in 2015:

○ Please note that the children listed below for whom child support was paid cannot be included on the FAFSA for number in the household (and/or listed in Section B above).

______________________________________________________________________________

______________________________________________________________________________

H. Child Support Received

During 2015 was child support RECEIVED by any member of the household listed above?

☐ Yes *
☐ No

*If yes:

Amount of child support RECEIVED in 2015: $____________________________

Name of household member who RECEIVED child support in 2015: ________________

Name of child(ren) for whom child support was RECEIVED in 2015:

______________________________________________________________________________

______________________________________________________________________________

I. Receipt of Benefits:

If you or a member of your household (spouse, children or other individuals that live in the household and receive more than half of the applicant’s support) received a benefit from any source listed below in calendar year 2014 and/or 2015, check all boxes that apply:

☐ SNAP (Supplemental Nutrition Assistance Program)
☐ WIC (The Special Supplemental Nutrition Program for Women, Infants, and Children)
☐ TANF (Temporary Assistance for Needy Families)

Please submit documentation from the agency that issued the benefits in 2014 and/or 2015.

☐ Check here if neither you nor a member of your household (spouse, children or other individuals that live in the household and receive more than half of the applicant’s support) received any benefits listed above in calendar year 2014 and/or 2015.
J. Sign this Worksheet
Each person signing this form certifies that all the information reported on it is complete and correct.
If married, spouse’s signature is optional.

_____________________________________________________________   Student
_____________________________________________________________   Date

_____________________________________________________________   Spouse
_____________________________________________________________   Date

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

J. Submit signed and completed Independent Verification Worksheet to the SFS office.

o SFS highly recommends students upload signed and completed forms in the ‘Student Tools’ tab of the TUportal. It is fast & easy!

o Students may also mail or fax to the appropriate SFS office:

<table>
<thead>
<tr>
<th>Temple University: Main Campus</th>
<th>Temple University: Ambler Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Financial Services</td>
<td>Student Financial Services</td>
</tr>
<tr>
<td>1801 N. Broad St.</td>
<td>580 Meetinghouse Rd</td>
</tr>
<tr>
<td>Ground Floor, Conwell Hall</td>
<td>103 West Hall</td>
</tr>
<tr>
<td>Philadelphia, PA 19122</td>
<td>Ambler, PA 19002</td>
</tr>
<tr>
<td>215-204-2244 (phone)</td>
<td>267-468-8443 (phone)</td>
</tr>
<tr>
<td>215-204-5897 (fax)</td>
<td>267-468-8228 (fax)</td>
</tr>
</tbody>
</table>

Visit Student Financial Services on the web for more information:

sfs.temple.edu