

2015-16 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 2014 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 2015-2016 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 **2014 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 2014 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

| | | | |
|---|----------------------|----------------|--|
| Student’s Last Name | Student’s First Name | Student’s M.I. | Student’s Temple University ID# |
| Student’s Street Address (include apartment number) | | | Student’s Date of Birth |
| City | State | Zip Code | Student’s Phone # (include area code)/Cell |

Student's Name: _____ TUID: _____

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, 2015, through June 30, 2016, or if the children would be required to provide your information if they were completing a FAFSA for 2015-2016.
 - 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, 2016.

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

| Full Name | Age | Relationship | College Attending 7/1/15-6/30/16 | Enrolled at least half-time? (Yes/No) |
|-----------|-----|--------------|----------------------------------|---------------------------------------|
| | | Self | Temple University | |
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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 2014 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 2014 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 2014 tax transcript and W-2s.
 - Check here if you earned income, but did not file a 2014 Federal Income Tax Return, and have attached all 2014 W2 form(s).
 - If you did not file a 2014 Federal Income Tax Return, but earned income in 2014, **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 2014.

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

- Check here if you successfully imported 2014 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 and (your spouse's) 2014 **joint** tax transcript and W-2s.
- Check here if you filed **separately** from your spouse and you are attaching 2014 tax transcripts and 2014 W-2s for **both** of you.
- Check here if you and/or your spouse earned income, but did not file a 2014 Income Tax Return.
 - If you or your spouse did not file a 2014 Federal Income Tax Return, but earned income in 2014, **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 2014.

Student's Name: _____ TUID: _____

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 2015-16 FAFSA.

| 2014 Additional Financial Information | STUDENT'S & SPOUSE'S (combined) |
|---|--|
| Child support paid because of divorce or separation or as a result of a legal requirement. DO NOT include support for children in parent's household. | \$ |
| 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 (DO NOT include Temple University scholarships or grants). | \$ |

| 2014 Untaxed Income | STUDENT'S & SPOUSE'S (combined) |
|--|--|
| Child support received for all children in your household. DO NOT include foster care or adoption payments. | \$ |
| Veterans non-education benefits such as Disability Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. | \$ |
| 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, line 25 and the first-time homebuyer tax credit from IRS form 1040, line 59b. DO NOT include 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. | \$ |

| 2014 Asset Information | STUDENT'S & SPOUSE'S (combined) |
|--|--|
| As of today, what is your (and spouse's) total current balance of cash, savings and checking accounts? DO NOT include student financial aid. | \$ |
| As of today, what is the net worth of your (and spouse's) investments, including real estate? DO NOT include the home you live in. Net worth means current value minus debt. | \$ |
| As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? DO NOT include a family farm or family business with 100 or fewer full-time or full-time equivalent employees. | \$ |

Student's Name: _____ TUID: _____

G. 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.

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

- SFS **highly recommends** students upload signed and completed forms in the 'Student Tools' tab of the TUportal. It is fast & easy!
- Students may also mail or fax to the appropriate SFS office:

| | |
|--|---|
| Temple University: Main Campus Student Financial Services 1801 N. Broad St. Ground Floor, Conwell Hall Philadelphia, PA 19122 215-204-2244 (phone) 215-204-5897 (fax) | Temple University: Ambler Campus Student Financial Services 580 Meetinghouse Rd 103 West Hall Ambler, PA 19002 267-468-8443 (phone) 267-468-8228 (fax) |
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Visit Student Financial Services on the web for more information:
sfs.temple.edu