

## 2015-16 Quality Assurance Program Dependent Student 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 parent’s 2014 IRS Tax Return Transcripts, W2 forms, and/or other financial documents. Federal regulations state that 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 Dependent Verification Form.** Make sure the form is **SIGNED** by both the student and parent. This form 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 parent(s), 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](http://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](http://www.fafsa.ed.gov).
    - **If IRS Data Retrieval Tool is used, an IRS Tax Return Transcript is not required by SFS.**
      - However, if you reported information for **Schedule C (Profit or Loss From Business)**, an IRS Tax Return Transcript will be required even with IRS DRT usage.

### A. Dependent 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. Dependent Student's Family Information**

List below the people in your custodial parent(s)' household. Include:

- Yourself.
- Your custodial parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your custodial parent(s)' other children.
  - If your parent(s) will provide more than half of their 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 they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) 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 (excluding parents' college)	Enrolled at least half-time? (Yes/No)
		Self	Temple University	

During 2014 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 in 2014: \$ \_\_\_\_\_

- DO NOT include foster care or adoption payments.

Name of person to whom child support was paid: \_\_\_\_\_

Name of child(ren) for whom child support was paid in 2014:

- 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).

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Signature of household member who paid child support in 2014

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

**C. Dependent Student's Income Information to Be Verified**

1. Check only one box below. IRS tax return transcripts include the 2014 IRS 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](http://www.IRS.gov).*

- Check here if you successfully imported 2014 IRS tax data using the IRS Data Retrieval Tool.
- Check here if you are attaching a copy of your 2014 IRS tax return transcript and 2014 W-2 form(s).
- Check here if you earned income, but did not file a 2014 Federal Income Tax Return, and have attached all 2014 W2 form(s).
  - o 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.

**D. Parent(s)' Income Information to Be Verified**

1. Check only one box below. Tax transcripts include the 2014 IRS transcript from filing Form 1040, 1040A, 1040EZ, 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](http://www.IRS.gov).*

- Check here if you successfully imported 2014 IRS tax data using the IRS Data Retrieval Tool.
- Check here if you are attaching a copy of your IRS tax return transcript and 2014 W-2 form(s).
- Check here if you earned income, but did not file a 2014 U Federal Income Tax Return, and have attached all 2014 W2 form(s).
  - o 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. 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	PARENT(S)	STUDENT'S
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 ( <b>DO NOT include</b> Temple University scholarships or grants).	\$	\$

**Did anyone in the household receive SNAP (Supplemental Nutrition Assistance Program) benefits during 2013 or 2014?**

- Yes
- No

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

2014 Untaxed Income	PARENT(S)	STUDENT'S
Child support <b>received</b> for all children in your household. <b>DO NOT</b> 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.  <b>DO NOT include</b> 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	PARENT(S)	STUDENT'S
As of today, what is your (and spouse's) total current balance of cash, savings and checking accounts? <b>DO NOT include</b> student financial aid.	\$	\$
As of today, what is the net worth of your (and spouse's) investments, including real estate?  <b>DO NOT include</b> 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?  <b>DO NOT include</b> a family farm or family business with 100 or fewer full-time or full-time equivalent employees.	\$	\$

**F. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. The student and *at least one parent* must sign and date. Electronic signatures are NOT acceptable.

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Parent Date

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

Student's Name: \_\_\_\_\_ TUID: \_\_\_\_\_

**G. Submit signed and completed Dependent 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 and easy!
- Students/Parents have the option to mail or fax documentation to the appropriate SFS office:

<b>Temple University: Main Campus</b> Student Financial Services 1801 N. Broad St. Ground Floor, Conwell Hall Philadelphia, PA 19122 215-204-2244 (phone) 215-204-5897 (fax)	<b>Temple University: Ambler Campus</b> 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](http://sfs.temple.edu)