



2018-19 Dependent Verification Instructions

Background: Your FAFSA was selected for review in a process called “Verification.” PCA&D is required to compare your FAFSA with requested documents and the attached worksheet. Your financial aid cannot be processed until all requested information is received. Failure to complete the verification process in a timely matter may result in the loss of financial aid eligibility. This review must be conducted under the financial aid program rules (34 CFR, Part 668). Any changes to your FAFSA made necessary by the verification process will be forwarded to federal processors by PCA&D.



We cannot accept a copy of your tax return(s). Instead, if requested, you must go back into your FAFSA and use the Data Retrieval Tool or request and send us a copy of your IRS Tax Return Transcript (see directions below).

Step 1: Documentation

- Refer to the enclosed missing information letter to see if we are requesting an IRS Tax Transcript for **yourself and/or your parent(s)**. *If we are not requesting IRS Tax Transcripts, skip to Step 2.*
- If we require an IRS Tax Transcript you will see it listed as one of your required documents on the accompanying letter, showing as “not received”. If required, you have two options – The preferred method is to go back into your FAFSA and use the IRS Data Retrieval Tool (IRS-DRT) OR order an IRS tax return transcript (see below).

1. IRS-DRT:

To re-submit the 2018-2019 FAFSA and select the IRS data retrieval option, log back into your FAFSA at www.fafsa.ed.gov, you will be able to make corrections to your submitted FAFSA without having to start over. The data retrieval tool is available 2-3 weeks after filing taxes electronically on-line or 6-8 weeks after filing by hard copy. Once corrected using IRS-DRT, re-submit your FAFSA.

Or

- #### **2. Order an IRS tax transcript:** 2016 IRS Tax Return Transcript may be obtained via the following:

Online Request - Go to www.irs.gov, on the IRS homepage click on “Get Your Tax Record.” 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

Please note that the Verification process will not be complete until the FAFSA is (re)submitted using the IRS-DRT or required Tax Return Transcripts are received. Do NOT send copies of federal, state or local tax returns to the school.

Step 2: Verification Worksheet

- Complete this worksheet in its entirety – Complete Student and Parent information
- Affix all required signatures

Step 3: Submit Documentation

- Submit this worksheet along with any other financial documents we requested in Step 1 to the Financial Aid Office. Refer to the accompanying letter for list of documents. If we are requesting “Documentation of Other Untaxed Income” please be sure to thoroughly complete sections 4, 6 & 8 on the worksheet.
- Scanned/emailed or faxed copies are acceptable.
- If you or your family owns a business, please include the additional IRS tax form “Schedule C or C-EZ”

SECTION 1: STUDENT INFORMATION

| | | | |
|-------------|--|-----------|----------------|
| Student SS# | | Phone # | |
| First Name | | Last Name | Middle Initial |

SECTION 2: FAMILY (HOUSEHOLD) INFORMATION

DEPENDENT: List yourself (the student), your parents (including a stepparent) even if you don't live with your parents. Your parents' other children if your parents will provide more than half of the children's support from 07/01/18 through 06/30/19, or if the other children would be required to provide parental information if they were completing a 2018-19 FAFSA. Include children who meet either of these standards, even if a child does not live with your parents. Other people if they now live with your parents and your parents provide more than half of their support, and will continue to provide more than half of that person's support through 06/30/19.

| Full Name | Age | Relationship | College** | Enrolled at Least 1/2 (Yes or No) |
|-----------|-----|--------------|--------------------------------------|-----------------------------------|
| | | Self | Pennsylvania College of Art & Design | |
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** Include the name of the college for 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 07/01/17 and 06/30/18. If more space is needed, attached a separate sheet.

SECTION 3: TAX FORMS AND INCOME INFORMATION FROM 2016

Complete this section for any person you listed above (excluding siblings) who worked, but did not file taxes for 2016.

| Non-Tax Filer's Name | Name of Employer(s) in 2016 | Amt. Earned in 2016 (include W-2s) |
|----------------------|-----------------------------|------------------------------------|
| | | |
| | | |

SECTION 4: FOOD STAMPS (SNAP)

| List the amount of Food Stamp benefits received in 2016 for the people reported in Section 2. Also provide a statement from the applicable agency or alternative documentation that shows proof of benefits received in 2016. | Full Name | Amount received |
|---|-----------|-----------------|
| | | \$ |
| | | \$ |
| | | \$ |
| | | \$ |
| | | \$ |

SECTION 5: ADDITIONAL 2016 FINANCIAL INFORMATION

| Answer each question by filling in the correct amount. If a question is left blank, it will be assumed to be zero. | Student | Parent(s) |
|---|---------|-----------|
| Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. | | |
| Taxable student grant and scholarship aid if you reported it 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 scholarships reported on your 1098-T. | | |
| Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay. | | |
| Earnings from work under a cooperative education program offered by a college. | | |

SECTION 6: UNTAXED 2016 INCOME

| Answer each question by filling in the correct amount. If a question is left blank, it will be assumed to be zero. | | | Student | Parent(s) |
|---|--|--|---------|------------|
| Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. | | | | |
| Child support received for any of your children. Don't include foster care or adoption payments. | | | | |
| Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing. | | | | |
| Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. | | | | |
| Other untaxed income not reported on the previous questions, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, additional 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, benefits from flexible spending arrangements, foreign income exclusion or credit for federal tax on special fuels. | | | | |
| Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. | | | | XXXXXXXXXX |

SECTION 7: ASSET INFORMATION

| Answer each question by filling in the correct amount. If a question is left blank, it will be assumed to be zero. | | | Student | Parent(s) |
|--|--|--|---------|-----------|
| Total current balance of cash, savings and checking accounts on the day you filed your FAFSA. | | | | |
| Net worth of your investments, including real estate on the day you filed the FAFSA. (Don't include the home in which you or your parents live. Net worth means current value minus debt.) | | | | |
| Net worth of current businesses and /or investment farms on the day you filed your FAFSA. (Don't include a family farm or business with 100 or fewer full-time equivalent employees.) | | | | |

SECTION 8: CHILD SUPPORT PAID

Complete this section if your parents paid child support in 2016.

| Name of individual paying child support | Amount paid | Child support recipient | Name of the child (children) for whom support was paid |
|---|-------------|-------------------------|--|
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SECTION 9: PRINT AND SIGN THIS WORKSHEET

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If dependent, at least one parent must sign. If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student date

Parent date