



2014-15 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 any 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 2014-2015 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 weeks after filing taxes on line or 6 weeks after filing by hard copy. Once corrected, re-submit your FAFSA.

or

2. Order an IRS tax transcript:

Order your tax return transcript you have the following ordering options. Please note that it will take approximately 10 days until you receive your tax transcript unless you choose “Get Transcript Online”.

- Via www.irs.gov/Individuals/Get-Transcript, click on “Get Transcript Online”
- Create an Account with the IRS (if you already have one, skip this step)
- Once an account has been created, log in
- Indicate the reason for requesting the transcript is “Higher Education/Student Aid”
- The Return Transcript will be boxed and highlighted – select year “2013”
- Disable the pop-up blocker to receive the PDF version of your Tax Return Transcript

Or

(2) phone 1-800-908-9946; follow prompts, select “**Tax Return Transcript**” opt. 2 and “2013”

Please note that the Verification process will not be complete until the FAFSA is (re)submitted using the IRS-DRT or required Tax Transcripts are received. Do NOT send 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 you or your family owns a business, please include the additional IRS tax form “Schedule C.”

SECTION 1: STUDENT INFORMATION

Student SS#		Phone #	
First Name		Last Name	Middle Initial

SECTION 2: FAMILY (HOUSEHOLD) INFORMATION

DEPENDENT: List yourself, your parent(s) (including step-parent), and their children even if they do not live with your parent(s) but will receive more than half of their support from them between July 1, 2014 and June 30, 2015, and other people who live with them and will receive more than half of their support from them between July 1, 2014 and June 30, 2015.

Full Name	Age	Relationship	College (if applicable)**
		<i>Self</i>	<i>PCA&D</i>

**Write the name of the college for any household member (other than your parents) who will attend at least half time between July 1, 2014 and June 30, 2015 and will be enrolled in a college degree/certificate program.

SECTION 3: TAX FORMS AND INCOME INFORMATION FROM 2013

Complete this section for any person you listed above (excluding siblings) who worked, but did not file taxes for 2013.

Non-Tax Filer's Name	Name of Employer(s) in 2013	Amt. Earned in 2013 (include W-2s)

SECTION 4: FOOD STAMPS (SNAP)

List the amount of Food Stamp benefits received in 2013 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 2013.	Full Name	Amount received
		\$
		\$
		\$
		\$

SECTION 5: ADDITIONAL 2013 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 2013 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 2013.

Name of individual paying child support	Amount paid	Child support recipient	Name of the child (children) for whom support was paid

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