

2016–2017 Household Resources Verification Worksheet Dependent Student

Your 2016–2017 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we must ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information, the Student Financial Services (SFS) Office staff will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the SFS Office. Clarion may ask for additional information.

A. Dependent Student’s Information

Student’s Last Name	Student’s First Name	Student’s M.I.	Student’s Clarion ID Number
Student’s Street Address (include apt. no.)			Student’s Date of Birth
City	State	Zip Code	Student’s Alternate or Cell Phone Number
Student’s Home Phone Number (include area code)			

B. Dependent Student’s Family Information

List below the people in your **parents’ household**. **Include:**

- The **student**.
- The **parent(s)** (including a stepparent) even if the student doesn’t live with the parent(s).
- Your **parents’ other children** if your parent(s) will provide more than half of the children’s support from July 1, 2016, through June 30, 2017, or if the other children would be required to provide parental information if they were completing a FAFSA for 2016–2017. Include children who meet either of these standards even if the children do not live with the parent(s).
- **Other people** if they now live with your parent(s) and your parent(s) provide more than half of the other person’s support, and will continue to provide more than half of that person’s support through June 30, 2017.

Include the name of the college for any household member, **excluding your parent(s)**, 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 July 1, 2016, and June 30, 2017. Please contact the SFS Office if your parent(s) will be enrolled in a degree program during the 2016-17 academic year.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>Clarion University</i>	

C. Dependent STUDENT'S Income Information to Be Verified

1. **STUDENTS WHO FILED A FEDERAL TAX RETURN**—**Important Note:** If the student filed, or will file, an **amended** 2015 IRS tax return, the student must contact the SFS Office before completing this section.

Instructions: Complete this section if the student, filed or will file a 2015 IRS income tax return. *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.gov.* In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT if that information was **not changed** by the FAFSA filer.

Check the box that applies:

- The student **has used** the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA.
- The student **has not yet used** the IRS Data Retrieval Tool in *FAFSA on the Web*, but **will** use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed.
- The student is **unable, or chooses not to use** the IRS Data Retrieval Tool in *FAFSA on the Web*, and instead will provide the school with a **2015 IRS Tax Return Transcript**.

A 2015 IRS Tax Return Transcript may be obtained through:

- **Online Request** – Go to www.IRS.gov, under the Tools heading on the IRS homepage, click “Get a Tax Transcript by Mail.” Next, click “Get Transcript by MAIL.” 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

In most cases, for electronic tax return filers, 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2-3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the Student Financial Services Office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

- Check here if the student's IRS Tax Return Transcript is attached to this worksheet.
- Check here if the student's IRS Tax Return Transcript will be submitted to Clarion later. **Verification cannot be completed until the IRS tax return transcript has been submitted to the SFS Office.**

2. **STUDENTS WHO DID NOT FILE A FEDERAL TAX RETURN**—Complete this section if the student, WILL NOT file AND is not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- I was not employed and had no income earned from work in 2015.
- I was employed in 2015 and have listed below the names of all my employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. List every employer even if the employer did not issue an IRS W-2 form. (Provide **signed** copies of all 2015 IRS W-2 forms issued to the student by their employers.)

Employer's Name	IRS W-2 Provided?	2015 Amount Earned
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

D. PARENT'S Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. PARENT(S) WHO FILED A FEDERAL TAX RETURN—**Important Note:** If your parent(s) filed, or will file, an **amended** 2015 IRS tax return, filed separate 2015 tax forms, or had a change in marital status after December 31, 2015, you must contact the Student Financial Services Office before completing this section.

Instructions: Complete this section if the parents filed or will file a 2015 IRS income tax return(s). *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.gov.* In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT **if** that information was **not changed** by the FAFSA filer.

Check the box that applies:

- The parent(s) **have used** the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA.
- The parent(s) **have not yet used** the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed.
- The parent(s) are **unable, or choose not to use** the IRS Data Retrieval Tool in *FAFSA on the Web*, and instead will provide the school with a **2015 IRS Tax Return Transcript(s)**.

A 2015 IRS Tax Return Transcript may be obtained through:

- **Online Request** – Go to www.IRS.gov, under the Tools heading on the IRS homepage, click “Get a Tax Transcript by Mail.” Next, click “Get Transcript by MAIL.” 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

If the parent(s) filed separate 2015 IRS income tax returns, the IRS DRT cannot be used and the **2015 Tax Return Transcript(s)** must be provided for both.

- Check here if the parent(s)' IRS Tax Return Transcript(s) is attached to this worksheet.
- Check here if the parent(s)' IRS Tax Return Transcript(s) will be submitted to Clarion later. **Verification cannot be completed until the IRS tax return transcript has been submitted to the SFS Office.**

2. PARENTS WHO DID NOT FILE A FEDERAL TAX RETURN—Complete this section **if** your parent(s), **WILL NOT** file AND are **not required** to file a 2015 income tax return with the IRS. Note: We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.

Check the box that applies:

- My parent(s) was not employed and had no income earned from work in 2015.
- One or both parents were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. List every employer even if the employer did not issue an IRS W-2 form. (Provide **signed** copies of all 2015 IRS W-2 forms issued to the parent(s) by their employer(s).)

Employer's Name	IRS W-2 Provided?	2015 Amount Earned
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

E. PARENT’S Other Information to Be Verified

1. Please check and complete and appropriate box concerning the receipt of SNAP benefits.

The parent(s) certify that _____, a member of the parents’ household, received benefits from the Supplemental Nutrition Assistance Program (SNAP) sometime during 2014 or 2015. SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433-3243).

Note: If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued the SNAP benefits in 2014 or 2015.

No one in the parents’ household received SNAP benefits in either 2014 or 2015.

2. If one or both of the parents included in the household and/or the student paid child support in 2015, provide in the space below the names of the persons who paid the child support, the names of the persons to whom the child support was paid, the names and ages of the children for whom the child support was paid, and the total annual amount of child support that was paid in 2015 for each child.

If more space is needed, provide a separate page that included the student’s name and ID number at the top.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name and Age of Child for Whom Support Was Paid	Annual Amount of Child Support Paid in 2015
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones (Age 15)</i>	<i>\$6,000.00</i>
Total Amount of Child Support Paid			\$

F. Verification of Other Untaxed Income for 2015

If any item does not apply, enter “N/A” for Not applicable where a response is requested, or enter \$0 in an area where an amount is requested.

If the student was required to provide parental information on the FAFSA, answer each question below as it applies to the student **and** the student’s parent(s) whose information is on the FAFSA.

2015 IRS W-2 forms: Provide **signed** copies of all 2015 IRS W-2 forms issued by the employers to the dependent student and the student’s parents.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2015, multiply that amount by the number of months in 2015 you paid or received that amount. If you did not pay or receive the same amount each month in 2015, add together the amounts you paid or received each month during 2015.

1. Payments to tax-deferred pension and retirement savings

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plan (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.

Name of Person Who Made the Payment	Total Amount Paid in 2015
Total Payments to Tax-deferred Pension and Retirement Savings	\$

2. Child support received

List the actual amount of any child support **received** in 2015 for the children in your household.

Do not include foster care payments, adoption payments, or any amount that was court-ordered, but not actually paid.

Name of Adult Who Received the Support	Name and Age of Child For Whom Support Was Received	Annual Amount of Child Support Received in 2015
Total Amount of Child Support Received		\$

3. Housing, food, and other living allowances paid to members of the military, clergy, and others

Include cash payments and/or the cash value of benefits received.

Do not include the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Annual Amount of Benefits Received in 2015
Total Amount of Benefits Received		\$

4. Veterans non-educational benefits

List the total amount of veterans **non-education** benefits received in 2015. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

Do not include federal veterans educational benefits such as: Post-9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, or VEAP Benefits.

Name of Recipient	Type of Veterans Non-educational Benefit	Annual Amount of Benefit Received in 2015
Total Amount of Benefits Received		\$

5. Other untaxed income

List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability benefits, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

Do not include any items reported or excluded in 1-4 above. In addition, do not include extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Annual Amount of Other Untaxed Income Received in 2015
Total Amount of Other Untaxed Income		\$

6. Money received or paid on the student's behalf

List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2015. Include support from a parent whose information was not reported on the student's 2016-2017 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions **unless the person is the student's parent whose information is reported on the student's 2016-2017 FAFSA.** Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Purpose: e.g., Cash, Rent, Books	Source	Annual Amount Received in 2015
Total Amount Received		\$

7. Additional Information

So that we can fully understand the student's family's financial situation, please provide below information about any other resources, benefits, and other amounts received by the student and any members of the student's household. This may include items that were not required to be reported on the FAFSA or other forms submitted to the financial aid office, and include such things as federal veterans' education benefits, military housing, SNAP, TANF, etc.

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

Name of Recipient	Type of Financial Support	Annual Amount of Financial Support Received in 2015
Total Amount of Financial Support Received		\$

Please include any additional comments you would like to make about any of the provided information on a separate sheet of paper that includes the student's name and ID number.

G. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and 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 Signature

Date

Parent's Signature

Date

Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to:

**Clarion University of Pennsylvania
Student Financial Services Office
Becht Hall
840 Wood Street
Clarion, PA 16214**

(You should make a copy of this worksheet for your records.)