

## St. John's College

### 2017-18 Dependent Student Verification Worksheet

#### What is Verification?

Your 2017-18 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, the government may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, the Financial Aid Office 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 must complete and sign this worksheet, attach any required documents, and submit them to the Financial Aid Office at St. John's College. **Please provide the required information as quickly as possible because your financial aid cannot be processed until verification has been completed. If you have any questions, please contact us at 410-626-2502 or [annapolis.financialaid@sjc.edu](mailto:annapolis.financialaid@sjc.edu) for the Annapolis Campus or 505-984-6058 or [santafe.financialaid@sjc.edu](mailto:santafe.financialaid@sjc.edu) for the Santa Fe Campus.**

#### What are the Steps?

1. Complete the IRS Data retrieval through FAFSA on the Web (Please review Verification Worksheet Instructions for more information).
2. If you cannot complete Step 1, you may order a **TAX RETURN TRANSCRIPT** from the Internal Revenue Service online at [www.irs.gov/Individuals](http://www.irs.gov/Individuals) or by phone at 1-800-908-9946. Obtain a **2015 Federal IRS Tax Return Transcript** for yourself and your parents (Please review Verification Worksheet Instructions for more information).
3. Complete and sign this worksheet – you and at least one parent must sign.
4. Review all information sent from the Financial Aid Office and the second page of this worksheet to see if you need to submit other documentation.

#### A. Student Information

\_\_\_\_\_  
 Last Name                                      First Name                                      M.I.                                      Last 4 digits of Social Security Number

\_\_\_\_\_  
 Address (Include Apt. #)                                      City                                      State                                      Zip Code

\_\_\_\_\_  
 Date of Birth                                      Cell Phone Number (Include Area Code)

#### B. Dependent Student's Family Information

List **all** the people in your household between July 1, 2017 & June 30, 2018. Include **yourself, your parents, & your parents' other children** if: (a) your parents provide more than half of their support from July 1, 2017 through June 30, 2018, (b) the children would be required to provide parental information when applying for Federal Student Aid, even if they don't live with the parents. Include **other people** only if they now live with your parents and receive, and will continue to receive, more than half their support from them between July 1, 2017 and June 30, 2018.

List the college for any household member who 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, 2017, and June 30, 2018.

FULL NAME	AGE	RELATIONSHIP	COLLEGE
		<i>Student</i>	<i>St. John's College</i>
		Parent	n/a
		Parent	n/a

### C. Student's Income Information

Check the appropriate boxes below and provide the requested information and documents:

- I used the IRS Data Retrieval Tool (after my 2015 taxes were completed and processed by the IRS) to transfer my 2015 income information to the FAFSA and made no further changes to the information (Review Verification Worksheet Instructions for more in depth guidance in using the IRS Data Retrieval Tool).
- I did not (or could not) transfer my 2015 income information to the FAFSA using the IRS Data Retrieval Tool. I have attached a copy of my **2015 IRS Tax Return Transcript** (Review the Verification Worksheet Instructions for more in depth guidance in ordering a 2015 IRS Tax Return Transcript).
- I was not required to file a 2015 Federal Income Tax Return. Nontax filers and tax filers who received an extension but still have not filed their income tax return must provide confirmation of nonfiling dated on or after October 1, 2016. A confirmation of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7. All nontax filers are required to provide an IRS Verification of Non-Filing Letter (Form 4506-T) dated on or after October 1, 2016, which can be requested at [www.irs.gov](http://www.irs.gov). Please list below the names of all the student's employers and the amount earned from each employer in 2015. (Enter "No Job" under "Employer Name" if you did not work.) If additional space is needed, attach a separate page with the student's name at the top.

Employer's Name	2015 Amount Earned	IRS W-2 Attached?

### D. Parents' Income Information

Check the appropriate boxes below and provide the requested information and documents:

- I used the IRS Data Retrieval Tool (after my 2015 taxes were completed and processed by the IRS) to transfer my 2015 income information to the FAFSA and made no further changes to the information (Review Verification Worksheet Instructions for more in depth guidance in using the IRS Data Retrieval Tool).
- I did not (or could not) transfer my 2015 income information to the FAFSA using the IRS Data Retrieval Tool. I have attached a copy of my **2015 IRS Tax Return Transcript** (Review the Verification Worksheet Instructions for more in depth guidance in ordering a 2015 IRS Tax Return Transcript).
- I was not required to file a 2015 Federal Income Tax Return. Nontax filers and tax filers who received an extension but still have not filed their income tax return must provide confirmation of nonfiling dated on or after October 1, 2016. A confirmation of nonfiling can be obtained from the IRS using Form 4506-T and checking box 7. All nontax filers are required to provide an IRS Verification of Non-Filing Letter (Form 4506-T) dated on or after October 1, 2016, which can be requested at [www.irs.gov](http://www.irs.gov). Please also list below the names of all the parents' employers and the amount earned from each employer in 2015. (Enter "No Job" under "Employer Name" if you did not work.) If additional space is needed, attach a separate page with the student's name at the top.

Employer's Name	2015 Amount Earned	IRS W-2 Attached?

### E. Certification

Each person signing this worksheet certifies that all of the information reported on it is complete and accurate. Warning: If you purposefully give false or misleading information on this form, you may be fined, sentenced to jail, or both. **Electronic signatures will not be accepted.**

Student Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_

Date: \_\_\_\_\_

When all required documents have been gathered, you may submit your information by one of the following methods. Watch for two sided documents. Be sure to include both sides when emailing or faxing.

**Annapolis Campus**  
 Financial Aid Office  
 St. John's College  
 60 College Avenue  
 Annapolis, MD 21401  
[Annapolis.financialaid@sjc.edu](mailto:Annapolis.financialaid@sjc.edu)

**Santa Fe Campus**  
 Financial Aid Office  
 St. John's College  
 1160 Camino Cruz Blanca  
 Santa Fe, NM 87505-4599  
[Santafe.financialaid@sjc.edu](mailto:Santafe.financialaid@sjc.edu)

Office Use Only:

Verification Completed By \_\_\_\_\_

Date \_\_\_\_\_

Review \_\_\_\_\_

Date \_\_\_\_\_

# St. John's College

## 2017-18 Dependent Student Verification Instructions

For about half of our students, the U.S Department of Education requires schools to verify the data reported on the Free Application for Federal Student Aid (FAFSA). Your file has been selected for verification; please follow the steps as outlined below.

1. You must complete the 2017-18 Dependent Verification Worksheet. **Remember to answer every question on the form; in addition the form must be SIGNED by the student and at least one parent.**
2. Both you and your parent(s) must provide official 2015 federal tax information. **If you and/or your parents are not required to file a federal tax return per the IRS regulations, you will need to indicate this in Sections C and D on the 2017-2018 Dependent Verification Worksheet and submit W-2's and 1099-Misc. forms for 2015.**
3. **Additionally, nontax filers are required to provide an IRS Verification of Non-Filing Letter dated on or after October 1, 2016.** The letter can be obtained by visiting [www.irs.gov](http://www.irs.gov) and typing in "Form 4506-T" in the search box. Once you have reached the form, fill out lines 1a through 5, check the box on line 7, type 12/31/2015 on line 9, then print and sign.
4. If you and/or your parents are required to file a federal tax return, **you have two options (A and B listed below) in which to submit income information. Please make sure to indicate in Sections C and D on the 2017-2018 Dependent Verification Worksheet which option you choose.**

### A. IRS Data Retrieval Tool (HIGHLY RECOMMENDED FOR FASTER PROCESSING)

Most FAFSA filers have the option of securely transferring their 2015 income data directly from the Internal Revenue Service (IRS) database to their online 2017-2018 FAFSA. If you did not take advantage of this data transfer at the time you originally completed your FAFSA, you can still do so by going to [www.fafsa.gov](http://www.fafsa.gov) and updating your and your parents' tax information reported on the FAFSA. You would need to select "Make FAFSA Corrections" and follow appropriate steps. Applicants will need to authenticate their identity before any personal information will be displayed. Once authenticated, you will be prompted to "transfer" the tax information to the FAFSA. You will need to complete this process for both you and your parents if a 2015 federal tax return is required to be filed with the IRS. You and your parents **should not** use the IRS Data Retrieval process if any of the following situations apply:

- Parents listed all zeros for Social Security Numbers on the FAFSA;
- Student used an 888 identifier in place of a Social Security Number on the FAFSA;
- Parents marital status date listed on the FAFSA is later than January 1, 2016;
- Student and/or parents have not yet filed or will not file a 2015 federal tax return;
- Parents have a tax filing status of "married filing separately" for 2015; or
- **For those with unusual tax filing circumstances, please see the reverse side of this document for instructions or call 410-626-2502 (Annapolis) or 505-984-6058 (Santa Fe) for instructions regarding your specific situation**

### B. IRS Tax Return Transcript

If you and/or your parents are required to file a 2015 federal tax return and did not use the IRS Data Retrieval Process, you and/or your parents must request a 2015 Tax Return Transcript from the IRS and upon receipt submit a copy to the Student Financial Services Office. For parents who had a filing status of "married filing separately", IRS Tax Return Transcripts must be submitted for each parent. **PLEASE NOTE: IT MAY TAKE UP TO TWO WEEKS FOR THE IRS TO PROCESS YOUR REQUEST.** There are three methods to request a Tax Return Transcript:

- Via the IRS website at [www.irs.gov/individuals](http://www.irs.gov/individuals), you can request one on-line;
- By calling **1-800-908-9946**; or
- Complete and submit FORM 4506-T to the IRS.

5. **Please submit in a timely fashion all documents at the same time to the address below. Until all documents are received, the file cannot be reviewed.**

**Annapolis Campus**  
Financial Aid Office  
St. John's College  
Fax 410-626-2885  
[annapolis.financialaid@sjc.edu](mailto:annapolis.financialaid@sjc.edu)

**Santa Fe Campus**  
Financial Aid Office  
St. John's College  
Fax 505-984-6164  
[santafe.financialaid@sjc.edu](mailto:santafe.financialaid@sjc.edu)

6. **Please review the instructions to make sure you have completed and submitted all the required documents. Failure to submit all the documents as per the instructions will delay processing your file.**
7. **You must submit required documents before classes begin. If you do not, your financial aid may be reduced or canceled and all charges must be paid out of pocket.**
8. **If verification results in changes to your award, we will send you a new award notification to your Geneva email address.**

## Verification of 2015 Income Information for Individuals with Unusual Circumstances

### Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A signed copy of the original 2015 IRS income tax return that was filed with the IRS or a **2015 IRS Tax Return Transcript** or the 2015 tax year.
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

### Individuals Who Were Victims of IRS Identity Theft

- A victim of IRS identity theft who is not able to obtain a **2015 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2015 IRS income tax return information.

### Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2015 income tax return(s).