

St. John's College

2018-19 Independent Student Verification Worksheet

What is Verification?

Your 2018-19 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. **Please provide the required information as quickly as possible because your aid cannot be finalized until verification has been completed. If you have any questions, please contact us at 410-626-2502 or annapolis.financialaid@sjc.edu for the Annapolis Campus or 505-984-6058 or santafe.financialaid@sjc.edu.**

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 irs.gov/individuals/get-transcript or by phone at 1-800-908-9946. Obtain **2016 Federal IRS Tax Return Transcripts** for yourself and your spouse. (Please review Verification Worksheet Instructions for more information).
3. Complete and sign this worksheet.
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	Email Address	Phone Number (Include Area Code)	

B. Independent Student's Family Information

List **all** the people in your household between July 1, 2018 and June 30, 2019. Include **yourself**, **your spouse** (if married), and **your children** and **your spouse's children** if you will provide more than half of their support from July 1, 2018 through June 30, 2019, even if they don't live with the you. Include **other people** only if they now live with you and receive, and will continue to receive, more than half of their support from you between July 1, 2018 and June 30, 2019.

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, 2018, and June 30, 2019.

FULL NAME	AGE	RELATIONSHIP	COLLEGE
		<i>Self</i>	<i>St. John's College</i>

C. Student and Spouse's Income Information

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

- ☐ I used the IRS Data Retrieval Tool (after my 2016 taxes were completed and processed by the IRS) to transfer my 2016 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 2016 income information to the FAFSA using the IRS Data Retrieval Tool. I have attached a copy of my **2016 IRS Tax Return Transcript** (Review the Verification Worksheet Instructions for more in depth guidance in ordering a 2016 IRS Tax Return Transcript).
- ☐ I was not required to file a 2016 Federal Income Tax Return. I have **attached copies of all 2016 IRS W-2 forms** issued to the student. Please list below the names of all the student's employers (even if a W-2 is not available), the amount earned from each employer in 2016, and whether an IRS W-2 form is attached. (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. All nontax filers are also required to **provide an IRS Verification of Non-Filing Letter (Form 4506-T)** dated on or after October 1, 2017, which can be requested at www.irs.gov. Additional information on how to obtain the IRS Verification of Non-Filing Letter can be found on the instructions page.

Employer's Name	2016 Amount Earned	IRS W-2 Attached?

D. Certification

The 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: _____

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 21401-1687
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

Office Use Only:

Verification Completed by: _____

Date: _____

2018-2019 Independent 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 2018-2019 Independent Verification Worksheet. **Remember to answer every question on the form; in addition the form must be SIGNED by the student.**
2. Both you and your spouse, if married, must provide official 2016 federal tax information. **If you and/or your spouse are not required to file a federal tax return per the IRS regulations, you will need to indicate this in Sections C on the 2018-2019 Independent Verification Worksheet and submit W-2 and 1099-Misc. forms for 2016.**
3. **Additionally, nontax filers are required to provide an IRS Verification of Non-Filing Letter dated on or after October 1, 2017.** The letter can be obtained by visiting 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 12/31/2016 on line 9, then print and sign.
4. If you and/or your spouse 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 Section C on the 2018-2019 Independent Verification Worksheet which option you will use.**

A. IRS Data Retrieval Tool

Most FAFSA filers have the option of securely transferring their 2016 income data directly from the Internal Revenue Service (IRS) database to their online 2018-2019 FAFSA. This option is available to individuals whose 2016 federal tax return has already been processed by the IRS. 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 and updating your 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 is displayed. Once authenticated, you will be prompted to "transfer" the tax information to the FAFSA. **(HIGHLY RECOMMENDED FORM OF SUBMISSION FOR FASTER PROCESSING).** You **should not** use the IRS Data Retrieval Process if any of the following situations apply:

- You used an 888 identifier in place of a Social Security Number on the FAFSA;
- Your marital status date listed on the FAFSA is later than January 1, 2017;
- You have not yet filed or will not file a 2016 federal tax return;
- You have a tax filing status of "married filing separately" for 2016;
- **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 are required to file a 2016 federal tax return and did not use the IRS Data Retrieval Process, you must request a 2016 Tax Return Transcript from the IRS and upon receipt submit a copy to the Financial Aid Office. For students who had a filing status of "married filing separately, IRS Tax Return Transcripts must be submitted for both the student and their spouse. **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 irs.gov/individuals/get-transcript, 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

Santa Fe Campus

Financial Aid Office
St. John's College
Fax 505-984-6164

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 you will need to pay your account balance out of pocket.**
8. **If verification results in changes to your award, we will email you an award notification to your St John's email address.**

Verification of 2016 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 2016, provide both of the following:

- A signed copy of the original 2016 IRS income tax return that was filed with the IRS or a **2016 IRS Tax Return Transcript** for the 2016 tax year.
- A signed copy of the 2016 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 **2016 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 2016 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2016 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 2016 income tax return(s).

Current Year Income Is Less Than 2016 Income

- Please contact the appropriate campus financial aid office for further instruction.