

2019-20 Verification Worksheet (5)

Your FAFSA was selected by the U.S. Dept. of Education for review in a process called “verification”. In this process, we are required by Federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with an IRS Tax Return Transcript of your 2017 Federal tax filing (and your spouse’s if you are married, or parents’ if you are considered dependent for Federal aid purposes). If there are differences between your FAFSA and the documents submitted, corrections will be made by our office.

What you should do:

1. Collect your (and your spouse’s or parents’) financial documents (IRS Tax Return Transcripts and W-2’s)
2. **Complete all of the sections and sign the worksheet.** You (and a parent if you are required to provide parent income information) must complete all sections.
3. Contact the Office of Financial Aid if you have questions about this form.
4. We will compare the information on the documents provided and make corrections if necessary.

A. Student Information

Last Name	First Name	MI	Social Security Number
Address (include apt. #)		City	State Zip
Date of Birth	email address		Phone Number (include area code)

B. Family Information

INDEPENDENT STUDENTS: List the people that you (and your spouse) will support between July 1, 2019 and June 30, 2020. Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2019 – June 30, 2020. Exclude children/siblings whom are wards of the state, i.e. foster care.

DEPENDENT STUDENTS: List all the people in your household between July 1, 2019 and June 30, 2020. Include yourself, your parent(s)/step-parents, and your parents’ other children if (a) your parents provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. 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, 2019 and June 30, 2020. Exclude children/siblings whom are wards of the state, i.e. foster care.

INDEPENDENT AND DEPENDENT: Write the name of the college for any family member who will be attending college at least half-time between July 1, 2019 and June 30, 2020 and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship	College
<i>Example: Martha Jones</i>	<i>22</i>	<i>Self</i>	<i>McKendree University</i>

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

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

PLEASE TURN OVER

C. Tax and Income Information

Did you (the student) file a 2017 Federal Tax Return?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you are a dependent student, did your parent(s)/step-parent(s) file a 2017 Federal Tax Return?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you are an independent and are married, did your spouse file a 2017 Federal Tax Return?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

If you answered Yes to any of the above questions, you must request an IRS Tax Return Transcript from the IRS.

- IRS Tax Return Transcript:** Submit your 2017 Tax Return Transcript (not a copy of your income tax return). Go to <https://www.irs.gov/individuals/get-transcript> to request a transcript.
- If you answered No to any of the above questions you will need to do the following:
 - If you are a Parent of a Depended student as defined by the FAFSA, or if you are an Independent student as defined by the FAFSA, you are required to submit a "Verification of Non-filing Letter" from the IRS if a 2017 tax return was not filed. Go to <https://www.irs.gov> to order the "Verification of Non-filing Letter" from the IRS.
 - List all employers even if the employer did not issue an IRS W-2 form. If W-2's were issued you must provide copies. If nothing is completed below we will assume no income from work or other sources. If more space is needed, provide a separate page with the student's name and ID number at the top.

Source of Income/Support	Student Income Amount	Spouse or Parent Income Amount

Did you receive any Untaxed Income during 2017?

☐ Yes ☐ No

If yes, please provide source (such as Payments to tax-deferred pensions and savings; housing, food and other living allowances paid to members of the military, clergy and others; Veterans non education benefits; money received or paid on the applicant's behalf) and list annual amount below:

If nothing is checked we will assume No.

Source of Untaxed Income	Student Untaxed Income Annual Amount	Spouse or Parent Untaxed Income Annual Amount

D. SNAP Benefits Received

Did you, your parent/step parent (if dependent student) or spouse (if independent student) receive benefits from the Supplemental Nutritional Assistance Program or SNAP (formerly known as Food Stamp Program) during 2017 or 2018? ☐ Yes ☐ No

If neither box is checked we will assume No.

E. Child Support

Did you, your parent/step-parent (if dependent student) or spouse (if independent student) **pay or receive** child support in 2017?

- ☐ Paid child support in 2017
☐ Received child support in 2017

If either or both boxes are checked, please complete below:

If nothing is checked we will assume No.

Name of Adult Who Paid Child Support	Name of Adult to Whom Child Support was Paid	Name of child for Whom Support was Paid	Age of Child	Annual Amount Paid/Received in 2017
Example: Marty Jones	Chris Smith	Terry Jones	8	\$4000

F. High School Completion Status

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2019-2020:

- ☐ A copy of the student's high school diploma.
☐ A copy of the student's final official high school transcript that shows the date when the diploma was awarded.

- ☐ A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- ☐ For students who completed secondary education in a foreign country, a copy of the “secondary school leaving certificate” or other similar document.
- ☐ An academic transcript that shows the successful completion of at least a two-year program acceptable for full credit toward a bachelor’s degree.

Copy of high school completion for homeschooled students:

- ☐ For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- ☐ For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student’s parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above, must contact the financial aid office.

G. Identity and Statement of Educational Purpose

Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at **McKendree University** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state issued ID, or passport. The institution will maintain a copy of the student’s photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student’s ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below:

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
(Print Student’s Name)

Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **McKendree University** for 2019-2020.

(Student’s Signature)

(Date)

(Student’s ID Number)

(School Official’s Signature Present at Signing)

(Date)

If this form cannot be signed before a McKendree University representative, please complete the following form in front of a Notary.

**Identity and Statement of Education Purpose
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at **McKendree University** to verify his or her identity, the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
(Print Student's Name)
Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **McKendree University** for 2019-2020.

(Student's Signature)

(Date)

(Student's ID Number)

If this form was not signed in the Office of Financial Aid you must sign in the presence of a Notary and have the following Notary's Certification completed:

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____
(Date) (Notary's Name)

personally appeared, _____, and proved to me on basis of
(Printed name of signer)
satisfactory evidence of identification _____ to be the above-
(Type of unexpired government-issued photo ID provided)
named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary Signature)

My commission expires on _____
(Date)

Print Student's Name

Student's Social Security

Certifications and signatures: Each person signing below certifies that all of the information reported is complete and correct. The student and one parent (if the student is a dependent student) whose information was reported on the FAFSA must sign and date below.

Student's Signature	Date	Parent's Signature (dependent student only)	Date
Print student's name		Print parent's name (dependent student only)	