

2016-2017-V1 Standard Verification Group Form



Student's Name _____ Banner ID _____

The best way to verify taxable income is using the IRS Data Retrieval Tool which is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.ed.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into the student's FAFSA. It takes up to 2 weeks after filing for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to 8 weeks for paper IRS tax return filers

If an amended 2015 IRS tax return was filed you must provide a signed 1040X Amended US Income Tax Return.

DEPENDENT Students (IF YOU WERE REQUIRED TO INCLUDE PARENT INFORMATION ON THE FAFSA)

List the people in your parents' household, including:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents; and
- All other members of your parents' household, if your parents provide more than half of another members' support and will continue to provide more than half of another members' support from 7/1/16 through 6/30/17 AND who now live & will continue to live with your parents. Include children who meet the support standard, even if a child does not live with the parents.

INDEPENDENT Students (IF YOU WERE NOT REQUIRED TO INCLUDE PARENT INFORMATION ON THE FAFSA)

List the people in your household, including:

- Yourself, and your spouse if you have one; and
- Your children, if you will provide more than ½ of their support from 7/1/16 - 6/30/17 and other people if they live with you and you provide more than ½ of their support and will continue to provide more than half of their support through 6/30/17.



A. FAMILY INFORMATION

LIST THE NAMES OF ALL HOUSEHOLD MEMBERS from the above description (even those not in college) IN THE TABLE BELOW. Also list the name of the college and enrollment status for any family member, excluding your parent(s) that will be enrolled in a degree, diploma, or certificate program between July 1, 2016 and June 30, 2017. If you need additional space, attach a separate page.

First name	Last Name	Age	Relationship	University or College Name	Enrolled at least ½ time
			Self	John Carroll University	YES NO



B. STUDENT TAX FORM INFORMATION

*If you need a copy of your TAX RETURN TRANSCRIPT contact the IRS <https://www.irs.gov/Individuals/Get-Transcript>

STUDENT (to be completed for dependent and independent students)

Student's Marital Status: _____ Single _____ Married _____ Remarried _____ Widowed
_____ Legally Separated/Divorced (Date: ____/____/____) _____ Separated (no court action)

____ I/we have not or are unable to use the IRS Data Retrieval Tool. Attached is a copy of our SIGNED TAX RETURN TRANSCRIPT for 2015 (if Married and filed separately need return transcripts for both) and W2 forms. ****PROCEED TO NEXT PAGE****

____ I/we have used the IRS Data Retrieval Tool (either initially or when making corrections to the FAFSA) and have not altered any FAFSA tax figures. Attached are all W2s for 2015. ****PROCEED TO NEXT PAGE****



C. STUDENT NON TAX FILERS COMPLETE & SIGN BELOW only if a NON-US Tax Filer

____ I/we filed a foreign income tax return. Attached are any W2 forms for 2015, earnings statements or foreign tax returns to document all sources of 2015 income (taxable or non-taxable).

____ I/we are not filing and are not required to file a 2015 U.S. tax return, all income received in 2015 is marked below.

PLEASE IDENTIFY ALL SOURCES OF 2015 INCOME even if a W2 was not issued, attach a separate page if needed.

Employer(s)/Source(s)	W2 issued?	2015 Amount
	Yes/No	\$
	Yes/No	\$

IF NET EARNINGS from non W2 sources EXCEED \$400 A TAX RETURN MUST BE FILED. WE MAY REQUIRE YOU TO DOCUMENT THAT A 2015 TAX RETURN WAS NOT FILED OR REQUIRED. I/we hereby certify that no US tax return has been filed for 2015 and is not required. All monies received in 2015 are stated above. Sign below if you DID NOT, WILL NOT and ARE NOT REQUIRED to file a 2015 Federal tax return. Parent signature required if dependent.

Signature of Student Non Tax Filer

Signature of Parent (if dependent) OR Spouse Non Tax Filer (if married)



D. PARENT TAX FORM INFORMATION

*If you need a copy of your TAX RETURN TRANSCRIPT contact the IRS <https://www.irs.gov/Individuals/Get-Transcript>

PARENT (only to be completed by DEPENDENT students) This section should be completed with information from the parent with whom you filed the 16-17 FAFSA. The parent you lived with most during the 12 months prior to completing the original 16-17 FAFSA.

Parents' Marital Status: ☐ Married ☐ Remarried ☐ Separated (no court action) ☐ Widowed
☐ Unmarried and both parents living together ☐ Never Married ☐ Legally Separated/Divorced (Date: / /

☐ I/we have not or are unable to use the IRS Data Retrieval Tool. **Attached is a copy of our SIGNED RETURN TAX TRANSCRIPT for 2015 (if Married and filed separately need return transcripts for both parents) and W2 forms. ***PROCEED TO STEP F*****

☐ I/we have used the IRS Data Retrieval Tool (either initially or when making corrections to the FAFSA) and have not altered any FAFSA tax figures. **Attached are all W2s for 2015. ****PROCEED TO STEP F******



E. PARENT NON TAX FILERS COMPLETE & SIGN BELOW only if a NON-US Tax Filer

☐ I/we filed a **foreign** income tax return. **Attached are all W2 forms for 2015, earnings statements or foreign tax returns to document all sources of 2015 income** (taxable or non-taxable).

☐ I/we are not filing and **are not required** to file a 2015 U.S. tax return, **all income received in 2015 is marked below.**

PLEASE IDENTIFY ALL SOURCES OF 2015 INCOME EVEN IF A W2 WAS NOT ISSUED, if additional space is needed, attach a separate page.

Employer(s)/Source(s)	W2 issued?	2015 Amount
	Yes/No	\$
	Yes/No	\$

IF NET EARNINGS from non W2 sources EXCEED \$400 A TAX RETURN MUST BE FILED. WE MAY REQUIRE YOU TO DOCUMENT THAT A 2015 TAX RETURN WAS NOT FILED OR REQUIRED. I/we hereby certify that no US income tax return has been filed for the 2015 and is not required to be filed. All monies received in 2015 are stated above. Sign below if you DID NOT, WILL NOT and ARE NOT REQUIRED to file a 2015 Federal Tax Return.

Signature of Parent/Stepparent Non-Tax Filer

Signature of Parent/Stepparent Non-Tax Filer



F. UNTAXED/OTHER INCOME INFORMATION

Please indicate how much of each type of income shown below was received. **BE SURE TO ENTER ZEROS IF NO FUNDS WERE RECEIVED.** If entering figures, you **must** provide **DOCUMENTATION FROM THE AGENCY SUPPLYING THE INCOME FOR THE FULL CALENDAR YEAR 2015. FAILURE TO COMPLETE WILL DELAY THE PROCESS.**

Student/ Spouse	Type of Untaxed Income/Income Received or Paid <i>Enter amounts that represent the full Calendar Year 2015</i>	Parent(s)/ Stepparent
\$	Housing, food & other living allowances paid to members of military, clergy and others (cash payments & cash value of benefits) ----- Include BAS do not include BAH or combat pay (if untaxed)	\$
\$	Veteran's non-education benefits such as Disability, Death Pension, Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Report untaxed portions of health savings accounts from IRS Form 1040 Line 25	\$
\$	Worker's Compensation, Disability or Railroad benefits not included in AGI.	\$
\$	List any payments (direct or withheld from earning) to tax-deferred pension and retirement savings plans, including but not limited to the amount reported in boxes 12 a – 12d with codes D,E,F,G,H and S	\$
\$	Other untaxed income. Including money or amounts on the student's behalf received from a parent grandparent whose financial information is not reported on the FAFSA. Identify source _____.	\$
\$	Taxable student grant & scholarship aid reported to the IRS in your AGI or Taxable earnings from Federal Work Study programs SUBMIT 2015 FEDERAL 1040	\$
\$	Amount of child support RECEIVED in 2015 for <u>any</u> child reported in the household. Name of adult who received support _____ Name of child for whom support was received _____ Attach documentation from the county for all payments received in 2015	\$
\$	Amount of child support PAID in 2015 for children NOT included on the FAFSA. List child(ren) & age for whom this support was paid: _____ Attach documentation from the county for 2015 or last paystub received in 2015.	\$
YES NO	SNAP/Food Stamps received in 2014 or 2015 for any family member listed in Section A. Attach official documentation showing benefits RECEIVED IN 2014/2015	YES NO



G. CERTIFICATION Must be signed by hand in ink

By signing this certification, I/we confirm that all information reported on this form in support of the student's application for financial aid is complete & correct. **If I/we have amended our tax return we will submit a signed 1040X WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

Student Signature

Date

Parent Signature (dependent students only)

Date

Student's E-mail Address

Parent's E-mail Address

This form and documentation can be faxed to 216.397.3098, e-mailed to enrollment@jcu.edu, or mailed to John Carroll University, Office of Financial Aid, 1 John Carroll Blvd., University Heights, OH 44118. If you have questions about this form call 888.335.6800