

Toll Free (800)561-2606

Student's Name: _____ Student ID # _____

Section C: Dependent Student's Income Information to Be Verified

TAX RETURN FILERS—

Important Note: If the student filed, or will file, an amended 2015 IRS tax return, the student must contact the financial aid administrator before completing this section.

Check the box that applies:

- ☐ The student has used the IRS Data Retrieval Tool on FAFSA to transfer 2015 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The University will use the IRS information that was transferred in the verification process.*
- ☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2015 IRS income information into the student's FAFSA once the student has filed a 2015 IRS tax return. *The University cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- ☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2015 IRS tax return transcript**—not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2015 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
- ☐ *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 the University later. Verification cannot be completed until the IRS tax return transcript has been submitted to the University.*

TAX RETURN NONFILERS—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:

- ☐ The student was not employed and had no income earned from work in 2015.
- ☐ The student was employed in 2015 and has listed below the names of all the student's employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is attached. Attach copies of all 2015 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Student ID Number at the top.*

Employer's Name	2015 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>

Student's Name: _____ Student ID #: _____

Section 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.

TAX RETURN FILERS—

Important Note: If the parent filed, or will file, an amended 2015 IRS tax return, the parent must contact the financial aid administrator before completing this section.

Check the box that applies:

- ☐ The parent(s) used the IRS Data Retrieval Tool on FAFSA to transfer 2015 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The University will use the IRS information that was transferred in the verification process.*
- ☐ The parent(s) has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2015 IRS income information into the student's FAFSA once the parent(s) has filed a 2015 IRS tax return. *The University cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- ☐ The parent(s) is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the parent(s) will submit to the school a **2015 IRS tax return transcript**—not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2015 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
- ☐ *Check here if the parent's IRS tax return transcript is attached to this worksheet.*
- ☐ *Check here if the parent's IRS tax return transcript will be submitted to the University later. Verification cannot be completed until the IRS tax return transcript has been submitted to the University.*

TAX RETURN NONFILERS—Complete this section if the parent will not file and is not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- ☐ The parent was not employed and had no income earned from work in 2015.
- ☐ The parent was employed in 2015 and has listed below the names of all the parent's employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is attached. Attach copies of all 2015 IRS W-2 forms issued to the parent by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Student ID Number at the top.*

Employer's Name	2015 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>

Section E: Parent's Other Information to Be Verified

1. Complete this section if someone in the student's parent's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2014 or 2015 calendar years.

☐ One of the persons listed in Section B of this worksheet received SNAP benefits in 2014 or 2015. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2014 and/or 2015.

2. Complete this section if one of the student's parents paid child support in 2015.

☐ One (or both) of the student's parents listed in Section B of this worksheet paid child support in 2015. The parent has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2015 for each child. If asked by the school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes the student's name and Student ID Number at the top.*

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

Section 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 2016-2017. **Please circle the statement that applies to you.**

- A copy of the student's high school diploma is attached.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded is attached.
- A copy of the student's General Educational Development (GED) certificate, an official GED transcript that indicates the student passed the exam, or a state-authorized high school equivalent certificate is attached.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document is attached.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit towards a bachelor's degree is attached.
- For a homeschooled student from a state where state law requires the student to obtain a secondary school completion credential for homeschool (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 is attached.

****A student who is unable to obtain the documentation listed above must contact the Financial Aid Office.****

Student's Name: _____ Student ID # _____



G. Identity/Statement of Educational Purpose

The form must be completed and signed in the presence of either a Lincoln University Financial Aid Administrator or a Notary Public. Do not complete this section in advance.

Name of Student: _____ Student ID#: _____
Last Name First Name M.I.

The student must appear in person at Lincoln University, Office of Financial Aid to verify his or her identity by presenting 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 with the date it was received and the name of the official at the institution authorized to collect the student's ID. In addition, the student must sign in the presence of the institutional official the following:

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 Lincoln University for 2016-2017.

Student's Signature Date Student's ID Number

If Submitting in Person: Present this form with original valid government-issued photo ID. To be completed by Lincoln University Financial Aid Administrator.		If Submitting by Mail: Send this form with a photocopy of valid government-issued photo ID. To be completed in the presence of a Notary Public.	
ID Type:		State of:	
ID Number: Date:		City/County of:	
FAA Name:		This instrument was acknowledged before me on:	
FAA Title:		By:	
FAA Signature: Date:		Signed: (Seal)	

Notary must list the type of government ID used to document identity:_____

Section H: Certification and Signatures

**Each person signing this worksheet certifies that all of the
Information reported on it is complete and correct.
The student and spouse, if married, 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

Student's Signature

Date

Parent's Signature

Date

Please return this worksheet, along with the required documentation to:

***Lincoln University
Office of Financial Aid
1570 Baltimore Pike
Lincoln University, PA 19352***

If you have any questions, please feel free to contact the Financial Aid Office at (800)-561-2606. Our office hours are 8:30 a.m. to 5:00 p.m., Monday through Friday.