

2016-2017 INDEPENDENT Verification Worksheet

Verification Group V6

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "Verification".

The following items are required prior to a financial aid award being finalized:

- (1) This completed and signed Verification Worksheet.
- (2) Your 2015 Federal Tax Transcript (if IRS Data Retrieval Tool was not utilized), or if applicable, the Statement of Non-Filing in Section C. Any W-2 or 1099 statements from 2015.
- (3) Your Spouses' 2015 Federal Tax Transcript (if IRS Data Retrieval Tool was not utilized), or if applicable, the Statement of Non-Filing in Section C
- (4) Any W-2 or 1099 statements from 2015.

If there are any differences between your FAFSA information and your financial documents, Lincoln University may need to make corrections to your record.

Section A: Student's Information

Last Name, First Name, M.I.

Street Address

City, State, Zip Code

Student ID Number

XXX-XX-
Social Security Number

Date of Birth

Phone Number

Section B: Independent Student's Family Information

List below the people in your household. Include:

- Yourself
- Your spouse, if you are married
- Your children, if any, if you will provide more than half of their support and will continue to provide more than half of their support thru June 30, 2017, or if the child would be required to provide your information if they were completing a FAFSA for the 2016-2017. Include children who meet either of these standards, even if they do not live with you.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support thru June 30, 2017.

Include the name of the college for any household member, who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2016, and June 30, 2017. *If more space is needed, attach a separate page with the student's name and Student ID Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
		<i>Self</i>	<i>Lincoln University</i>	

Student's Name: _____ Student ID # _____

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

TAX RETURN FILERS—

Important Note: If you (or your spouse, if married) filed, or will file, an amended 2015 IRS tax return, you must contact the financial aid administrator before completing this section.

Check the box that applies:

- ☐ The student and/or spouse 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 and/or spouse 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 and/or spouse are 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 IRS tax return transcript is attached to this worksheet.*
- ☐ *Check here if the 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 and/ or spouse was not employed and had no income earned from work in 2015.
- ☐ The student and/or spouse was employed in 2015 and has listed below the names of all 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 and/ or spouse 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: Additional Information (Untaxed Benefits)

1. **Child Support:** Child support actually paid or received because of divorce, separation, or as a result of a legal requirement. **Don't include** support for children in your household, foster care payments, or adoption payments.

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>

2. **SNAP Benefits:** Complete this section if you or someone in your 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.*

3. **Clergy, Military, Others:** Housing, food, and other living expenses paid to members of the military, clergy, and others including cash payment and/or cash value of benefits received. **Do not include** the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received in 2015	Amount of Benefit Received in 2015
<i>Rev. Marty Jones</i>	<i>Housing allowance</i>	<i>\$12,000</i>

4. **Veterans Non-Education Benefits:** List the total amount of veterans non-education benefits received in 2015. Such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Education Work-Study allowances. **Do not include** any veterans' education benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill

Name of Recipient	Type of Veterans Non-education Benefit in 2015	Amount of Benefit Received in 2015
<i>Harry Jones III</i>	<i>Death Pension</i>	<i>\$300/month</i>

Student's Name:

Student ID #

- 5. Other Untaxed Income:** List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. **Do not include** any items reported or excluded in A – D above. In addition, **do not include** student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

[illegible]

- 6. Money received or paid on the student's behalf:** List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2015. Include support from a parent whose information was not reported on the student's 2016–2017 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions unless the person is the student's parent whose information is reported on the student's 2016–2017 FAFSA. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

[illegible]

Student's Name: _____ Student ID # _____

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 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 both.

Student's Signature

Date

Spouse'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.