



2018-19 Independent Student Verification Worksheet V1IND

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Federal law states that before awarding Federal Student Aid, we are required to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this verification worksheet along with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and your spouse (if married), whose information was reported on the FAFSA must complete and sign this verification worksheet, attach any required documents, and submit all materials to the Office of Student Financial Services. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

Complete all sections of this form. Please pay careful attention to the instructions provided in this section.

Once complete, please submit this form to the Office of Student Financial Services as soon as possible so that finalization of your financial aid will not be delayed. **NOTE: You and your spouse (if married) are required to sign this form in order for it to be official.**

SECTION 1: STUDENT/FAMILY INFORMATION

Student Name: _____ Wheaton ID _____
Last First M.I.

Address _____ Date of Birth _____
Street Address (include apt. no.)/P.O. Box mm/dd/yyyy

_____ Student Email _____
City State Zip Code

Phone Number _____ Alternate or Cell Phone Number _____
(include area code)

Complete the chart below with the information about the people in your household that you or your spouse (if married) will support between July 1, 2018 and June 30, 2019. Please include the following:

- Yourself
- Your spouse and your children if you will provide more than half of their support from July 1, 2018 through June 30, 2019.
- Other people if they now live with you, and you will provide more than half of their support, and will continue to provide more than half of their support from July 1, 2018 through June 30, 2019.
- Report your household members in college if they will attend, for at least 6 credit hours (or half time) in at least one term between July 1, 2018 and June 30, 2019, a program that leads to a college degree or certificate.

NOTE: As an Independent student always include yourself, your spouse (if married), and any other family member(s) that meet the criteria above. Please promptly notify us if there is any change.

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

Full Name (include custodial parent(s))	Age	Relationship to Student	College Name	Enrolled at Least ½ Time (Yes/No)	Year in College	Graduate School (Yes/No)
<i>You, the student</i>		<i>Self</i>	<i>Wheaton College</i>			<i>No</i>

SECTION 2: TAX AND INCOME INFORMATION

1. If you filed a 2016 IRS Tax Return (Form 1040, 10410A, 1040EZ), you are required to either use the IRS Data Retrieval Tool (IRS DRT) or submit a 2015 IRS Tax Return Transcript(s) to complete federal verification.

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.ed.gov. In most cases, no further documentation is needed to verify 2016 IRS income tax return information if the information was transferred into the student's FAFSA using the IRS DRT and the information was not changed. In most cases, for electronic filers, 2016 IRS income tax return information is available for the IRS DRT within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Tax returns filed on paper are generally available for the IRS DRT within 8–11 weeks after being received by the IRS. Contact the financial aid office if you have questions.

If you are unable to use the IRS Data Retrieval Tool (IRS DRT), you must submit to the college a copy of your 2016 IRS Tax Return Transcript(s).

Please note: a copy of your 2016 federal Income Tax Return is not acceptable documentation. To obtain an IRS Tax Return Transcript, go to www.irs.gov and click on the "Get Transcript of Your Tax Records" or call 1 (800) 908-9946 to order a transcript by phone. Please make sure you order the "IRS Tax Return Transcript." You will need your Social Security number, date of birth, and the address on file with the IRS (usually the address used to file your 2016 IRS Tax Return). It takes up to 2 weeks for IRS income information to be available for electronic IRS tax return filers, and up to 8 weeks for paper tax return filers. The IRS phone number is (800) 829-1040.

_____ Check here if you have used or plan to use the IRS Data Retrieval Tool (IRS DRT) on FAFSA.ed.gov

_____ Check here if your IRS Tax Return Transcript(s) is attached to this worksheet.

_____ Check here if your IRS Tax Return Transcript(s) will be submitted to us later. Note: Verification cannot be completed until the IRS Tax Return transcript(s) has been submitted.

_____ Check here if you will not file and are not required to file a 2016 U.S. Income Tax Return or you file a non U.S. Income Tax Return which has been attached to this worksheet (if not previously submitted to the college).

2. If you did not file and are not required to file a 2016 Federal Income Tax Return, please list any income received in 2016 in the box below. Use your 2016 W-2 forms or other earnings statements to complete this section. **Include a copy of all 2016 W-2 forms with this Verification Form.**

Employer's Name	2016 Amount Earned	2016 W-2 Forms Attached?
<i>ABC Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>

SPOUSE'S (if married) TAX AND INCOME

If you and your spouse filed separate 2016 Income Tax Returns (Form 1040, 10410A, 1040EZ) then neither you nor your spouse can use the IRS Data Retrieval Tool (IRS DRT). You are both required to submit a 2016 IRS Tax Return Transcript(s) to complete federal verification.

1. If both you and your spouse filed jointly then the best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.ed.gov. In most cases, no further documentation is needed to verify 2016 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. For electronic filers, 2016 IRS income tax return information is available for the IRS DRT process within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Tax returns filed on paper are generally available for the IRS DRT within 8–11 weeks after being received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

If you are unable to use the IRS Data Retrieval Tool (IRS DRT), you must submit a copy of your spouse's 2016 IRS Tax Return Transcript(s) to our office. **Please Note: a copy of your 2016 Income Tax Return(s) is not acceptable documentation.** To obtain an IRS Tax Return Transcript, go to www.irs.gov and click on the "Get Transcript of Your Tax Records" link under the Tools heading or call 1 (800) 908-9946 to order a transcript by phone. Make sure you request the "IRS Tax Return Transcript." You will need your spouse's social security number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2016 IRS Tax Return was filed). It takes up to 2 weeks for IRS income information to be available for electronic IRS tax return filers, and up to 8 weeks for paper tax return filers. The IRS phone number IRS is (800) 829-1040.

_____ Check here if your spouse has used or plans to use the IRS Data Retrieval Tool (IRS DRT) on FAFSA.ed.gov

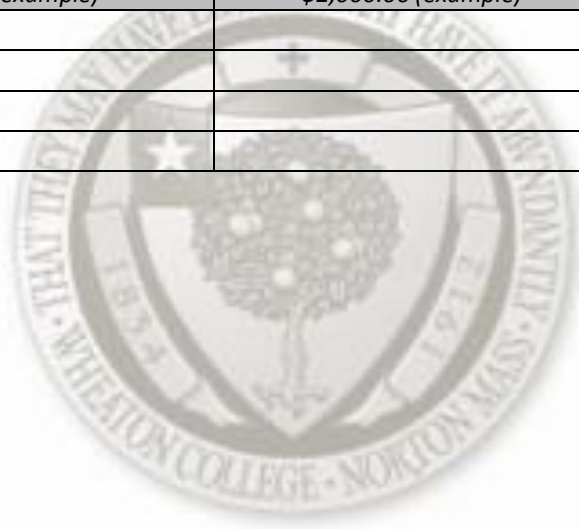
_____ Check here if your spouse's IRS Tax Return Transcript(s) is attached to this worksheet.

_____ Check here if your spouse's IRS Tax Return Transcript(s) will be submitted to us later. Note: Verification cannot be completed until the IRS Tax Return transcript(s) has been submitted.

_____ Check here if your spouse will not file and is not required to file a 2016 U.S. Income Tax Return or you file a non U.S. Income Tax Return which has been attached to this worksheet (if not previously submitted to the college).

2. If you (the spouse) did not file and are not required to file a 2016 Federal Income Tax return, list below your employer(s) and any income received in 2016 (use the W-2 form or other earnings statements, and submit legible copies).

Employer's Name	2016 Amount Earned	2016 W-2 Forms Attached?
<i>ABC Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>



SECTION 3: ADDITIONAL UNTAXED INCOME INFORMATION

OTHER UNTAXED INCOME:

Please list the amount of other untaxed income not reported elsewhere on this form. Include untaxed income such as worker’s compensation, disability, Black Lung benefits, untaxed portions of health savings accounts from IRS form 1040 Line 25, Railroad Retirement benefits, etc. 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 (WIAA), educational benefits, combat pay, benefits from flexible spending arrangements ((cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Annual Amount of Untaxed Income Received in 2016

If your response is zero or not applicable, please check this box.

SIGNATURES

Each person below certifies that all information reported on this form is complete and correct. The student and spouse (if married) whose information was reported on the FAFSA must sign and date this form.

Student’s Signature: _____ Date: _____
(Required)

Spouse’s Signature: _____ Date: _____
(Optional)

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Please submit this completed worksheet to:

**Wheaton College
Office of Student Financial Services
26 East Main Street
Norton, MA 02766
Phone (508) 286-8232
Fax: (508)286-3787
Email: sfs@wheatoncollege.edu**

(Remember to make a copy of this worksheet for your records)