

## 2017-2018 Independent Verification Worksheet (V5)

Student's Name: \_\_\_\_\_ (Student ID#) SID: \_\_\_\_\_  
Last First

Preferred Name (if different than above) \_\_\_\_\_  
Last First

Because your FAFSA (Free Application for Federal Student Aid) was selected for 'Verification', we must verify the tax information reported for you (and for your spouse if you're married). If there are discrepancies, we will make the necessary corrections to your FAFSA.

**Note:** If you filed a 2015 U.S. tax return, try to use the **IRS Data Retrieval Tool (IRS DRT)** through your FAFSA. If you are unable to use or choose not to use the IRS DRT, you must attach an **IRS Tax Return Transcript**. If you did not file taxes, you must attach a **Verification of Non-filing Letter**. To get these and other types of transcripts, you can go to [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript) or call **1-800-908-9946**. Go to your campus' Financial Aid webpage for more information.

### SECTION A. Tax Information

**Important Note:** The instructions for this form apply to income earned by you (and by your spouse if you are married). If you are married, and you and your spouse filed separate IRS income tax returns for 2015 or you had a change in marital status after December 31, 2015, please contact the Financial Aid Office for more information.

**Do not submit this form until** you have successfully completed the IRS DRT and/or have attached all required documents. If you need clarification or are unable to obtain the necessary documents, please contact your campus' Financial Aid Office.

**Box 1: Complete this box only if you (and/or your spouse, if you are married) filed a 2015 Income Tax Return in any country.**

**Check and complete all that apply** (you must be able to check at least one):

- I **have successfully used** the IRS Data Retrieval Tool (DRT) through my 2017-18 FAFSA to transfer my (and my spouse's, if married) 2015 IRS income tax return information.
- I **have attached** my (and my spouse's, if married) **2015 IRS Tax Return Transcript** to this worksheet. (If you and your spouse filed separate 2015 IRS income tax returns, you must provide 2015 IRS Tax Return Transcripts for each of you.)
- I (and/or my spouse) filed a second 2015 U.S. Tax Return (an '**Amended Tax Return**') to make corrections to the first 2015 Tax Return. I have **attached both** a signed copy of the filed Amended Tax Return (IRS Form 1040X) **and** a copy of the 2015 Tax Return Transcript.
- I (and/or my spouse) **filed a 2015 Income Tax Return in a country other than the U.S.**, and I **have attached** a signed copy of that filed tax return, along with a conversion of information to U.S. dollars.

**Box 2: Complete this box only if you (and/or your spouse, if you are married) did not file a 2015 Income Tax Return in any country.**

- You must attach an **IRS Verification of Non-filing Letter** for 2015 for the person(s) who did not file.

**Check and complete all that apply:**

- I have **attached an IRS Verification of Non-filing Letter** for 2015 for the person(s) who did not file.
- I (and/or my spouse) was/were **not employed** and had **no** 2015 income earned from work (including business income, odd jobs, etc.). **If this applies to only you or your spouse** because you were not married in 2015, please indicate which one: **Yourself** **Your Spouse**
- I (and/or my spouse) was/were **employed** in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether the employer provided a W-2 form.
  - List every source of income earned in or out of the U.S., even if a W-2 form was not issued; include odd jobs, etc.
  - **You must attach a copy of all W-2 forms issued.** If a W-2 form was not issued, please attach an explanation.

| Employer's (source's) Name     | If married, indicate "Self" or "Spouse" | Amount earned in 2015 | IRS W-2 Form Issued? | If earned outside of the U.S., which country? |
|--------------------------------|---|-----------------------|----------------------|---|
| <i>Example: Sarah's Bakery</i> | <i>Self</i>                             | <i>\$2,000</i>        | <i>No</i>            | <i>Canada</i>                                 |
|                                |   |                       |                      |   |
|                                |   |                       |                      |   |
|                                |   |                       |                      |   |

If you need more space, please attach a signed separate page with the students name and ID number at the top.

Student's Last Name

First Name

SID

**SECTION B. Family Information**

Please list the following people in the chart below:

- **Yourself**
- **Your** spouse if you are married.
- **Your** children **only if** you will provide more than half of the children's financial support from July 1, 2017 through June 30, 2018.
- Other people currently living with you **only if** you currently provide and will continue to provide more than half of their financial support from July 1, 2017 through June 30, 2018.
- **Do not** include any people who live with you but support themselves with their own income, even if they share some expenses.

| Full Name                   | Age       | Relationship to Applicant | Name of College (if attending half-time or more during the 2017-18 academic year) |
|-----------------------------|-----------|---------------------------|---|
| Example: <i>Susan Jones</i> | <i>30</i> | <i>Self</i>               | <i>(name of your primary college)</i>   |
|                             |           |                           |   |
|                             |           |                           |   |
|                             |           |                           |   |
|                             |           |                           |   |
|                             |           |                           |   |
|                             |           |                           |   |

\*NOTE: If you need more space, please attach an additional page with the student's name and ID number at the top.

**Section C. Sign This Worksheet**

By signing this worksheet, I certify that all the information reported to qualify for federal student aid is complete and correct. I understand that, periodically, additional documents and/or information may be requested of me and my family by the Financial Aid Office.

Student's Signature

Date

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

The student must appear in person at \_\_\_\_\_ to  
(Foothill/De Anza College)

verify his or her identity by presenting a 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  
(Print Student's Name)

Statement of Educational 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

\_\_\_\_\_ for 2017-2018.

(Foothill/De Anza College)

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

**Attention Students:**

**If you are unable to appear in person at the Financial Aid Office, please complete the next page of this form instead of this side.**

**OR**

**Identity and Statement of Educational Purpose  
(To Be Signed With Notary)**

If the student is unable to appear in person at \_\_\_\_\_  
(Foothill/De Anza College)

to verify his or her identity, the student must provide:

- (a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

Statement of Educational 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

\_\_\_\_\_ for 2017-2018.  
(Foothill/De Anza College)

\_\_\_\_\_  
(Student's Signature) (Date)

\_\_\_\_\_  
(Student's ID Number)

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Notary's name)

personally appeared, \_\_\_\_\_, and provided to me  
(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

(seal)

\_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_  
(Date)

## High School Completion Status

Provide one of the following documents to indicate what your high school completion status will be when you begin college:

- A copy of the high school diploma.  
(Evidence of passing the CASHEE may be required for CA High School graduates.)
- A copy of the final official high school transcript that shows the date when the diploma was awarded.  
(Evidence of passing the CASHEE may be required for CA High School graduates.)
- A copy of the General Educational Development (GED) certificate, an official GED transcript that indicates the student passed the exam, or a state-authorized high school equivalent certificate, like the California High School Proficiency Examination (CHSPE).
- 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 indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.  
A student who is "home-schooled" in California by a parent who does not hold a California teacher credential is not eligible to satisfy this requirement, because that "school" would not meet the exemption definition of a "high school" in California.
- If State law does not require a homeschooled 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 documents the successful completion of 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.