New College
THE HONORS COLLEGE of Florida

2014-2015
Academic Year

Office of Admissions & Financial Aid
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2014-2015 VERIFICATION WORKSHEET — INDEPENDENT

Your Free Application for Federal Student Aid (FAFSA) was selected for a process called "verification". Federal regulations require that we check the accuracy of the information provided on the FAFSA before disbursing any federal aid. During this process, we will be comparing the information provided on this form and your 2013 IRS Tax Return Transcript to that provided on the FAFSA that you filed. ***Additional documentation may be required in order to resolve any differences or questions that arise.*** Once information is confirmed, financial aid staff will make any necessary adjustments to your FAFSA.

Final eligibility for aid cannot be determined until all requested documentation is received and the verification process is complete.

Student's Last Name Student's First Name	Student's ID Number
Student's Email Address	Student's Phone Number

Please read carefully. If a section is incomplete, it may delay the processing of your aid.

1. FAMILY INFORMATION AND HOUSEHOLD SIZE

List the people in your household between July 1, 2014 and June 30, 2015, including:

- Student.
- Student's spouse, if the student is married.
- Children/step-children if you or your spouse will provide more than half of their support from July 1, 2014 through June 30, 2015, **even if the children do not live with the student**.
- Other people if they now live with you and you or your spouse provides more than half of their support and will continue to do so from July 1, 2014 through June 30, 2015.

Include below information about any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2014 and June 30, 2015. Include the name of the college. You may include others only if they will attend, at least half-time in 2014-2015, **a program that leads to a college degree or certificate (this does not include students enrolled in a graduate or professional program).**

****We may require additional documentation if we have reason to believe that the information regarding household members OR their enrollment in an eligible postsecondary educational institution is not accurate.***

Full Name	*Age*	*Relationship to Student*	*College Currently Attending*	*Will be enrolled at least half time? (Yes or No)*
		SELF	*NEW COLLEGE OF FLORIDA*	*YES*

We may require additional documentation from the IRS that indicates a 2013 income tax return was not filed with the IRS. This may include a Wage & Income Transcript and/or a Verification of Nonfiling Letter.

2. STUDENT'S INCOME & TAX INFORMATION

If single, you must check only ONE box below. ***Refer to SECTION 6 for more information on the IRS Data Retrieval Tool, the IRS Tax Return Transcript, and other information related to the verification process.***

☐ I used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2013 IRS income tax return information into my FAFSA.

☐ I have not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2013 IRS income tax return information into my FAFSA once my 2013 IRS income tax return has been filed.

☐ I am unable or chose not to use the IRS Data Retrieval Tool in *FAFSA on the Web* and will instead provide a **2013 IRS Tax Return Transcript**.

☐ I filed a tax return and my **2013 IRS Tax Return Transcript** is provided.

☐ I filed a tax return and my **2013 IRS Tax Return Transcript** will be provided at a later date.

☐ I will not file and am not required to file a 2013 income tax return with the IRS. If this option is selected, please check the statement that applies:

◯ I was not employed and had no income earned from work in 2013.

◯ I was employed in 2013 and have listed below the names of all employers and the amount earned from each employer in 2013. **You are required to submit copies of all IRS W-2 or other earning statements (such as a 1099) issued in 2013.** Please indicate below if it is being submitted along with this worksheet. DO NOT LEAVE BLANKS. Use N/A if not applicable.

Employer's Name	*2013 Amount Earned*	*IRS W-2 Provided?*

If married, you must check only ONE box below. ***Refer to SECTION 6 for more information on the IRS Data Retrieval Tool, the IRS Tax Return Transcript, and other information related to the verification process.***

☐ We used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2013 IRS income tax return information into my FAFSA.

☐ We have not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2013 IRS income tax return information into my FAFSA once our 2013 IRS income tax return has been filed.

☐ We are unable or chose not to use the IRS Data Retrieval Tool in *FAFSA on the Web* and will instead provide a **2013 IRS Tax Return Transcript**.

☐ We filed a joint tax return and our **2013 IRS Tax Return Transcript** is provided.

☐ We filed a joint tax return and our **2013 IRS Tax Return Transcript** will be provided at a later date.

☐ We filed separate tax returns and BOTH of our **2013 IRS Tax Return Transcript(s)** are provided.

☐ We filed separate tax returns and the **2013 IRS Tax Return Transcript(s)** will be provided at a later date.

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☐ We will not file and are not required to file a 2013 income tax return with the IRS. If this option is selected, please check the statement that applies:

◯ We were not employed and had no income earned from work in 2013.

◯ We were employed in 2013 and have listed below the names of all employers and the amount earned from each employer in 2013. **You are required to submit copies of all IRS W-2 or other earning statements (such as a 1099) issued in 2013.** Please indicate below if it is being submitted along with this worksheet. DO NOT LEAVE BLANKS. Use N/A if not applicable.

Full Name	*Employer's Name*	*2013 Amount Earned*	*IRS W-2 Provided?*

3. CHILD SUPPORT PAID

Did you (or your spouse if you are married) pay child support because of a divorce, separation, or as a result of a legal requirement in 2013?

☐ **Yes** ☐ **No**

If answered yes, please fill out the chart below. Do not include child support paid for children in the household. You may attach a separate sheet if additional space is required.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support Was Paid	Name of Child for Whom Support Was Paid	Age of Child	Amount of Child Support Paid in 2013

If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided;
- A statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks or money order receipts.

4. SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP)

Did you or a member of your household receive benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as the Food Stamp Program) sometime during 2012 or 2013?

☐ **Yes** ☐ **No**

If answered yes, you must attach a statement from the applicable agency that shows you received food stamps in 2012 or 2013.

Supplemental Nutrition Assistance Program or SNAP may be known by another name in some states. In order to determine the name used in a specific state, please call 1-800-433-3243.

Student's household includes:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of their support from July 1, 2014 through June 30, 2015, **even if the children do not live with the student**.
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2015.

5. LOW INCOME VERIFICATION

You MUST complete this section if your (and your spouse's if applicable) income was less than $4,000 per family member in 2013.

Please provide a detailed explanation of household income and how expenses were paid throughout the year. You may attach a separate sheet if additional space is required.

6. IMPORTANT VERIFICATION AND TAX RETURN TRANSCRIPT INFORMATION

For incoming students, we award financial aid under the assumption that the information provided on the Free Application for Federal Student Aid (FAFSA) is accurate. No financial aid will be disbursed until you submit the required verification items. Once ALL required documents are submitted, we will review the information and make any required corrections to your FAFSA. If eligibility changes as a result of the correction, you receive a Revised Award Letter via an email to your NCF account and can view the changes in NewCLEIS.

PLEASE NOTE: All awards are TENTATIVE and subject to change or cancellation until verification items have been received and reviewed.

Returning students will not have any of their need-based aid or loans awarded until ALL required verification items have been submitted and reviewed.

Students will be notified of requirements impacting their financial aid via email and can view outstanding items on NewCLEIS. All required forms can be found on the portal at https://myncf.ncf.edu. Go to Campus Offices and select Admissions/Financial Aid.

The best way to securely and accurately transfer IRS tax information into a FAFSA is by using the IRS Data Retrieval Tool (IRS DRT) that is part of *FAFSA on the Web* at www.fafsa.gov. Using this tool may reduce the likelihood of being selected for verification and eliminate the need to request a 2013 tax return transcript from the IRS if selected. If you have now filed a 2013 income tax return and are eligible to use this tool, please go back into the application and update your tax information using this feature.

Students or parents who are married and filed as married filing separately, are married and filed as Head of Household, filed an amended tax return, **OR** filed a Puerto Rican or foreign tax return are not eligible to use the IRS Data Retrieval Tool and will need to enter their tax return information manually.

Signed copies of your 2013 income tax return 1040, 1040A or 1040 EZ are NOT ACCEPTABLE.

In order to obtain a *2013 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." Use the Social Security Number and date of birth of the first person listed on the 2013 IRS income tax return, and the address on file with the IRS.

2013 IRS Tax Return Transcripts must be provided for you (and your spouse if applicable) if:

1) separate IRS income tax returns were filed for 2013 OR
2) there was a change in marital status after the end of the 2013 tax year on December 31, 2013.

Please be sure to label any supporting documentation submitted to financial aid with the student's name and/or New College ID number.

NEW THIS YEAR: Once an online transcript request has been validated, the IRS will return a PDF version of a *2013 IRS Tax Return Transcript* in real-time. Tax filers can then print, save and/or forward the PDF transcript to the school.

New College email accounts (including ncfinaid@ncf.edu) are not a secure means of submitting tax information to our office.

Please keep in mind that the IRS cannot produce a *2013 IRS Tax Return Transcript* if you have not yet filed your 2013 income tax return OR if the IRS has not processed your filed return at the time of your request.

In most cases, electronic filers are able to request a *2013 IRS Tax Return Transcript* within 2-3 weeks after a 2013 IRS income tax return has been accepted by the IRS. Paper filers are able to request their *2013 IRS Tax Return Transcript* within 8-11 weeks after the 2013 paper IRS income tax return has been received by the IRS.

UNUSUAL CIRCUMSTANCES

1) Granted a filing extension by the IRS – please provide the following in addition to this worksheet:
   a. A copy of IRS Form 4868 "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return" that was filed with the IRS for tax year 2013;
   b. A copy of the IRS's approval of an extension beyond the automatic six-month extension if an additional extension of the filing time for tax year 2013 was requested; and
   c. A copy of IRS Form W-2 for each source of employment income received for tax year 2013 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2013.
2) Filed an amended IRS income tax return – please provide the following in addition to this worksheet:
   a. A signed copy of the original 2013 IRS income tax return that was filed with the IRS for tax year 2013;
   b. 2013 IRS Tax Return Transcript;
   c. A signed copy of the 2013 IRS Form 1040X "Amended U.S. Individual Income Tax Return" that was filed with the IRS for tax year 2013; and
   d. 2013 IRS Account Transcript once the 2013 IRS Form 1040X "Amended U.S. Individual Income Tax Return" has been submitted and processed.
3) Victim of IRS identity theft -- please provide the following in addition to this worksheet:
   a. Contact a special IRS toll-free number (800-908-4490) for assistance. Upon verification of your identity, the tax filer can request that the IRS provide a paper copy of an alternative document unique to identity theft issues. This is called a Tax Return Data Base View form (TRDBV).
   b. A copy of IRS Form 14039 "Identity Theft Affidavit" that was submitted to the IRS for tax year 2013.
4) Filed a Non-IRS income tax return
   a. A signed copy of the 2013 income tax return(s) for Puerto Rico, another U.S. territory, or a foreign country.

If you own businesses, have rental properties, investments, or significant savings accounts, please complete the enclosed Parent Asset Verification form in order to expedite the verification process.

Please contact our office if you have experienced any changes which would drastically impact your financial circumstances in 2014. Depending on the situation, additional forms and documentation **will be** required.

Each person signing this form certifies that all the information reported on it is complete and correct. The student (and spouse if married) must sign this form.

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

_____ _____

Student Date Spouse Date