

**2016-2017
VERIFICATION WORKSHEET
INDEPENDENT STUDENT**



OFFICE OF FINANCIAL AID
9201 University City Boulevard
Charlotte, NC 28223-0001
Phone: (704) 687-5504
Fax: (704) 687-1425

Your application was selected for a review process called **Verification**. In this process, we will be comparing information from the Free Application for Federal Student Aid (FAFSA) with your **2015 federal tax information**. Forms can be submitted in person, via U.S. mail or fax at 704-687-1425. **You will not receive a financial aid award until verification is complete, which also includes those who have requested an Extension of Time to File U.S. Income Tax Return (Form 4868).**

PRIORITY DEADLINE: JULY 1, 2016. All documents must be received in the financial aid office by the priority date to ensure students are awarded financial aid by the tuition payment date.

What Happens After I Submit My Information: Once you begin submitting documentation, the Financial Aid Office will:

1. Review the documents to be sure they are complete. The normal timeframe for processing is approximately 2 weeks but can vary depending on peak times.
2. If the documents are incomplete (missing signatures, questions are left blank, etc.) or raises additional questions for which we need clarification, we will request that the documents be resubmitted or request additional documentation. **NOTE: Requests for additional information will be sent to you via your My UNC Charlotte Account. Incomplete documents will not be processed.**
3. Once all documents are complete, the Financial Aid Office will review the information and compare it with the information reported on the FAFSA.

Required Tax Information:

- A. If you did not use the IRS Data Retrieval Tool when completing your FAFSA you have **two options**:
 1. Log back into your FAFSA and use the IRS Data Retrieval Tool to update your tax information or
 2. Request a copy of your tax transcript be mailed to you.
- B. If you were not eligible to use the IRS Data Retrieval Tool, you **MUST** request a Tax Return Transcript from the IRS.
- C. If you file an amended tax return, please provide our office with a signed copy of the IRS Form 1040X (Amended Tax Return).

How to use the IRS Data Retrieval Tool:

1. Go to www.fafsa.gov
2. Click the **Login Button** on the right side of the screen
3. Enter your information and click **"Next"**
4. Click on **"Make Corrections to a Processed FAFSA"**
5. Click on the **"Financial Information"** tab
6. Answer **"Already Completed"** to the question have your parents filed their IRS Income tax return, then by checking **"None of the above"** if that is accurate to the next question about the filing status, the **"Link to IRS"** button will appear. (If you cannot accurately check none of the above, you will need to submit an IRS Tax Transcript.)
7. Click on the **"Link to IRS"** button (you will be directed that you are leaving the FAFSA webpage).
8. Enter the information asked by the IRS page and then click **"Transfer Now"** to FAFSA.

How to Obtain a Tax Return Transcript from the IRS:

1. Be sure to request a **Tax Return Transcript, NOT an Account Transcript**.
2. Do NOT have transcripts sent directly to the Office of Student Financial Aid (OSFA).
3. To request a copy online, enter www.irs.gov and follow these steps:
 - a. On the main page under Tools, click **"Get Transcript of Your Tax Records"**
 - b. Click **"Get Transcript by Mail"**
 - c. Click **"Create Account"** and enter your information
4. Visit your local IRS office www.irs.gov/uac/Contact-Your-Local-IRS-Office-1
5. Paper Request: IRS form 4506T – Must be used if you have moved since filing you taxes. The form can be downloaded at www.irs.gov.



**Complete all sections. All forms must have required signatures.
You will not receive a financial aid award until verification is complete.**

Student Name _____ UNC Charlotte Student ID _____
Last First Middle

Telephone (_____) _____ E-mail _____

SECTION A – FAMILY INFORMATION: List the members of your household. Attach a separate sheet if necessary.

1. Student Marital Status as listed on FAFSA:

- Married/Remarried Single Divorced/Separated Widowed

Date you were married, separated, divorced or widowed: Month _____ Year _____

2. In the box below, list the people in your household including:

- Yourself and your spouse (if you have one), and
- Your children and other people if they meet the following criteria:
 - they now live with you, and
 - they now get more than half of their support from you, and
 - they will continue to get this support between July 1, 2016 and June 30, 2017.
- Write in the name of the college for any household member, who will be attending college at least half-time between July 1, 2016 and June 30, 2017.

| NAME | AGE | RELATIONSHIP | COLLEGE |
|------|-----|--------------|---------------|
| | | SELF | UNC Charlotte |
| | | | |
| | | | |
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SECTION B – INCOME TAX INFORMATION

| STUDENT'S INCOME INFORMATION (check one box only) | SPOUSE'S INCOME INFORMATION (check one box only) |
|---|--|
| <input type="checkbox"/> Check here if you will not file a 2015 US Income Tax Return. → Continue to Section C | <input type="checkbox"/> Check here if you will not file a 2015 US Income Tax Return. → Continue to Section C |
| <i>If you did not use the IRS Data Retrieval Tool:</i> <input type="checkbox"/> Check here if you will update your FAFSA by using the IRS Data Retrieval Tool (see instructions). <input type="checkbox"/> Check here if you did not complete the IRS Data Retrieval Tool and have attached a copy of your IRS Tax Return Transcript (see instructions). → Skip to Section D | <i>If you did not use the IRS Data Retrieval Tool:</i> <input type="checkbox"/> Check here if you will update the FAFSA by using the IRS Data Retrieval Tool (see instructions). <input type="checkbox"/> Check here if you filed " <u>married filing separately</u> " or <u>did not complete the IRS Data Retrieval Tool</u> . Please attach a copy(s) of your IRS Tax Return Transcript (see instructions). → Skip to Section D |
| <input type="checkbox"/> Check here if you were not eligible to use the IRS Data Retrieval Tool. You MUST attach a copy of your tax return transcript to this form (see instructions). → Skip to Section D | <input type="checkbox"/> Check here if you were not eligible to use the IRS Data Retrieval Tool. You MUST attach a copy of your tax return transcript to this form (see instructions). → Skip to Section D |

SECTION C – EARNED INCOME INFORMATION

PLEASE COMPLETE ONLY IF YOU (AND/OR YOUR SPOUSE) DID NOT FILE A TAX RETURN:

In the space below, list all employers and earned income from 2015 for the person that did not file a tax return. Also, please attach W2's to this form. If either you or your spouse had no income, or income less than \$5,000, complete and attach the **Supplemental Income Statement Form**. This form is available online at: <http://finaid.uncc.edu/forms-and-publications>.

| Employer Name | Student Amount | Spouse Amount | IRS W2- Attached? | |
|---------------|----------------|---------------|-------------------|----|
| | \$ | \$ | Yes | No |
| | \$ | \$ | Yes | No |
| | \$ | \$ | Yes | No |
| | \$ | \$ | Yes | No |

SECTION D – ADDITIONAL INFORMATION

Enter the amount yearly combined amount for you and your spouse. Do not leave any fields blank.

If zero or the question does not apply, enter 0.

| | Student | Spouse |
|---|---------|--------|
| Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children listed in the household. | | |
| Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. | | |
| Student grant and scholarship aid reported to the IRS in your adjusted gross income . Include AmeriCorps benefits (awards, living allowances and interest accrual payments) as well as grant and scholarship portions of fellowships and assistantships. This amount is listed as "SCH" on line 7 of your federal tax return. | | |
| Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay. | | |
| Earnings from work under a cooperative education program offered by a college. | | |
| Payments to tax deferred pension and retirement savings plan listed on W-2 box 12a through 12d with codes D, E, F, G, H and S. If an amount is listed, please attach W2 form(s). | | |
| Child support received for all children. Do not include foster care/adoption payments. | | |
| Housing, food, and other living allowances paid to members of the military, clergy (i.e. Pastor living in church housing), and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing. | | |
| Veterans' non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. | | |
| Other monthly untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on base military housing or a military housing allowance, combat pay (if you are non-tax filer), benefits from flexible spending, foreign income exclusion, or credit for federal tax on special fuels. Source: _____ | | |
| Money received or paid on your behalf (e.g. bills), not reported anywhere else on this form. | | |

SECTION E – SIGN THIS FORM

Each person signing this form certifies that all information reported is true and complete to the best of his/her knowledge. By signing below you are authorizing UNC Charlotte to make corrections to your original and/or subsequent applications based on the documents you are submitting. Individuals, who purposely provide false or misleading information on this worksheet may be fined, sent to prison or both.

Student's Signature _____ Date _____