



BELMONT UNIVERSITY
Student Financial Services

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2015–2016 VERIFICATION WORKSHEET

Your application was selected for review in a process called “Verification.” In this process, the university will be comparing information from your application with signed copies of you and your parent(s)’ 2014 Federal Income Tax Transcript, W-2 form(s), and other financial documents. The law says we have the right to ask you for this information before awarding Federal Aid. If there are differences between your application information and your financial documents, you or the university may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won’t be delayed. Your financial aid administrator will assist you.

What you should do

1. Collect you and your parent(s)’ financial documents (Federal Income Tax Transcript, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet(s)—you and at least one parent.
4. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.

A. Student Information

BU-ID Number: _____

Last Name First Name M.I.

Social Security Number

Address (include Apt. No.)

Date of Birth

City State ZIP Code

Telephone Number (include Area Code)

B. Family Information

List below the people in the **parent’s household** Include:

The student.

The parents (including a stepparent) even if the student doesn’t live with the parents.

The parents’ other children if the parents will provide more than half of their support from July 1, 2014, through June 30, 2015, or if the other children would be required to provide parental information if they were completing a FAFSA for 2014–2015. Include children who meet either of these standards even if the children do not live with the parents.

Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2014.

For any household member, excluding the parents, 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, 2015, and June 30, 2016**, include the name of the college.

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

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>		

Dependent

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: US Department of Education, Washington, DC 20202-5345.

C. Student's Income Information to Be Verified

1. **TAX RETURN FILERS**—**Important Note:** If you have filed, or will file, an amended 2014 Federal Income Tax Return, you must contact the financial aid administrator before completing this section.

Instructions: Complete this section if you, filed or will file a 2014 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log into child's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2014 IRS income tax information into your FAFSA. It takes up to **two weeks** for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to **eight weeks** for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box below that applies:

- Check here if you have not and will not file a 2014 Federal Income Tax Return. Please proceed to Section 2.
- If you have used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2014 IRS income information into your FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The university will request a copy of your IRS Transcript and w-2 form(s) not a photocopy of the income tax return.*
- If you have not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2014 IRS income information into your FAFSA once you have filed a 2014 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- If you are unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and you will submit to the school a **2014 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 2014 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 your IRS Tax Return Transcript is attached to this worksheet.
- Check here if your IRS Tax Return Transcript will be submitted to the school later and by _____ (date.)
Your verification cannot be completed until the IRS Tax Return Transcript has been submitted to the school.

2. **TAX RETURN NON-FILERS**—Complete this section if you will not file and is not required to file a 2014 Federal Income Tax Return.

Check the box that applies:

- I was not employed and had no income earned from work in year 2014.
- I was employed in 2014 and will list below the names of my employer(s), the amount earned in 2014, and whether an IRS W-2 form is attached. Attach copies of all 2014 IRS W-2 forms issued. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with Name and Student ID No. at the top.*

Employer's Name	2014 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

D. Parent's Income Information To Be Verified

Note: If both parents are reported in Section B of this worksheet, then the instructions and certifications below refer and apply to both parents.

1. **Parent TAX RETURN FILERS—Important Note:** If your parent(s), filed or will file, an amended 2014 Federal Income Tax Return, then your financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if your parent(s) filed or will file a 2014 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If your parent(s) have not already used the tool, then you and your parent should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if your parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2014 IRS income tax information into your FAFSA.*

Important NOTE:
It takes up to **two weeks** for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's Financial Aid Administrator.

Check the one box below that applies:

- Check here if you have not and will not file a 2014 Federal Income Tax Return. Please proceed to Section 2.
- Your parent(s) have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer their 2014 IRS income information into your FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The university will request a copy of your IRS Transcript and w-2 form(s) **not a photocopy of the income tax return.***
- Your parent(s) have not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2014 IRS income information into your FAFSA once your parent(s) IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. Your verification process cannot be completed until your parent(s) have transferred IRS information into your 2014/2015 FAFSA.*
- Your parent(s) is unable or chooses not to use the IRS Data Retrieval Tool, and your parent(s) will submit a copy of their **2014 Federal Tax Return Transcript(s)—not photocopies of the income tax return.** Federal Income Tax Returns include the **2014 IRS Form 1040, 1040A, 1040EZ**, a tax return from Puerto Rico or a foreign income tax return. If your parent(s) did not keep a copy of their tax return, they will need to request their **2014 IRS tax return transcript—not a photocopy of the income tax return.**

NOTE: 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 2013 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. *If your parents are married, and filed separate 2014 tax returns, then you will need to submit 2014 Tax Return Transcripts for each parent.*

- Check here if an IRS Tax Return Transcript(s) is attached to this worksheet.
- Check here if your IRS Tax Return Transcript(s) will be submitted to the student's school later and by _____ (date.).
Your verification process cannot be completed until the IRS Tax Return Transcript(s) has been submitted to the school.

Dependent

2. Parent TAX RETURN NON-FILERS with LOW or NO Income—Complete this section if your Parent(s) will not file and is not required to file

Check the box that applies:

- Your parent(s) was not employed and had no income earned from work in year 2014. Your parent(s) will need to submit a copy of their **2014 Wage Record File/Benefits History** from their *State of Residence Department of Labor Unemployment Office* (For Example: Louisiana residents should contact: 1-866-783-5567 or 1-866-487-9243) **or** *Social Security Administration (1-800-772-1213)*.

Please explain **in detail** your circumstances and specify how you are/were able to support yourself/your family with zero income. You must **include monetary amounts** such as money received, or any money paid on your behalf (e.g. bills or other misc. expenses). For additional space, you should use the reverse side or attach an additional letter. ***Our office reserves the right to ask for additional documentation if your explanation does not prove your situation.***

- Your parent(s) was employed in 2014 and did not file a 2014 Federal Income Tax Return. Please list below the names of all their employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is attached. Attach copies of all 2014 IRS W-2 forms. *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 Social Security Number at the top.*

Employer's Name	2014 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>

E. Parent's Income Information To Be Verified (please check all that apply)

1. Complete this section:

- a. I and/or my Parent(s) **did not** receive benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as Food Stamps) any time during the 2014 calendar year.
- b. I, my Parents, and/or Someone in my parent's household (listed in Section B) **receive(s)** benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as Food Stamps) any time during the 2014 calendar year.
Name of the individual(s) receiving benefits : _____

2. Complete this section if one of your parents **paid** child support in year 2014.

- One (or both) of your parents listed in Section B of this worksheet paid child support in 2014. Your parent should indicate below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2014 for each child. If asked by the school, you will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes your name and Student ID No. at the top.*

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 2014
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

F. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date.

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

Student

Date

Parent

Date

Don't forget to sign your forms!