

2018-2019 Verification Worksheet Independent Student V-5

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) was selected for a review process called Verification. You (and your spouse, if applicable) must complete and sign this worksheet, attach any required documents, and submit the form along with any other additional information required by the SWC Financial Aid Office.

**A. STUDENT INFORMATION**

Student Name \_\_\_\_\_ Student ID Number \_\_\_\_\_

Please include in the table below all of the people in your household and their college, *if applicable*:

- You and your spouse, if applicable, and;
- Your children, if you will provide more than half of their support between 7/1/18 to 6/30/19, and;
- Other people if they now live with you, you provide more than half of their support, and you will continue to provide more than half of their support between 7/1/18 and 6/30/19.
- Provide the full name of the college for a household member attending at least half time for the 2018-2019 year. Attach an additional sheet of paper if more lines are needed.

Name of Household Member	Age	Relationship to Student (circle one)	If Attending More than Halftime, Full Name of College
		<i>Self</i> (Student)	<i>SOUTHWESTERN</i>
		Spouse (if applicable)	

**For Income Information below, complete Section C OR Section D.**

**C. TAX FILER INCOME INFORMATION**

**STUDENT/SPOUSE (IF APPLICABLE)**

I certify that I/we **DID** file taxes for 2016. I/We have utilized the IRS Data Retrieval Tool (DRT) or have attached the 2016 IRS Tax Return Transcript **AND** W-2's (Instructions on page 2 on how to request, if needed). **SKIP to Section E.**

**D. NON-TAX FILER INCOME INFORMATION**

**Total Wages Earned from Work, Salaries, Tips, or Foreign Income:** **ATTACH** all 2016 W-2's for Student and Spouse, if applicable. If wages were earned from U.S. and not required to file a 2016 tax return, must also submit a "Verification of Non-filing Letter" from IRS dated on or after 10/1/17. If no income was earned in 2016, please indicate a "0" in the appropriate field. **DO NOT INCLUDE** amounts such as Cash Aid/TANF, Social Security benefits, Veteran's benefits, etc.

<p><b>Student</b></p> <p>\$ _____</p> <p><input type="checkbox"/> U.S. Income (W-2's attached)</p> <p><input type="checkbox"/> Foreign Income (see below)</p>	<p><b>Spouse (if applicable)</b></p> <p>\$ _____</p> <p><input type="checkbox"/> U.S. Income (W-2's attached)</p> <p><input type="checkbox"/> Foreign Income (see below)</p>
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**Note:** If foreign income earned, convert to U.S. dollars. If a foreign tax return was filed, attach a copy **AND** the SWC Foreign Income Conversion Form (found at [www.swccd.edu/faforms](http://www.swccd.edu/faforms)). When converting figures to U.S. dollars, use the exchange rate in effect on the day you completed your 2018-2019 FAFSA.

**E. STATEMENT OF EDUCATIONAL PURPOSE (DO NOT SIGN until in presence of FA Administrator)**

I certify that I, \_\_\_\_\_ (print student's name), am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes to pay the cost of attending Southwestern Community College for 2018-2019.

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Student Name \_\_\_\_\_ Student ID Number \_\_\_\_\_

**F. GOVERNMENT ISSUED PHOTO ID (UNEXPIRED) - To be completed by SWC Financial Aid Administrator**

Name of FA Administrator \_\_\_\_\_ Signature of FA Administrator \_\_\_\_\_

Type of Government-issued Photo ID Provided \_\_\_\_\_ Date \_\_\_\_\_

**G. HIGH SCHOOL COMPLETION STATUS**

Select **ONE** of the following documents that will be provided to indicate the student's high school completion status (attach document to this form) when the student begins college in 2018-2019.

- Copy of US or Foreign High School Diploma
- Copy of Final, Official US High School or Foreign High School Transcript showing graduation date
- Copy of General Educational Development (GED) certificate or GED transcript
- Official Academic Transcript indicating student successfully completed 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
- 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

Students who do not have a High School Diploma or recognized equivalent, and who first enroll in a program of study on or after July 1, 2012 WILL NOT be eligible to receive Title IV student aid. Students could qualify for Title IV student aid under one of the Ability to Benefit (ATB) alternatives if the student completed them and was enrolled in a Title IV eligible program prior to July 1, 2012. Those alternatives include the student passing an independently administered, approved ATB test or successfully completing at least six units of transferable work prior to that date. Foreign High School Diplomas may be referred to an outside agency for evaluation purposes.

Please check **ONE**:

- I am unable to obtain any of the documentation listed above and understand that I am not eligible to receive Financial Aid.
- My High School Diploma is on file. \_\_\_\_\_ (Signature of FA Administrator)

**H. SIGNATURES**

Signing this form certifies that the information reported is complete and correct and that any false statement or failure to provide proof when asked may be cause for delay, denial, reduction, or withdrawal of financial aid. Warning: purposely giving false and/or misleading information may be cause for a fine, sentence to jail, or both. Submit to the Financial Aid Office at the Chula Vista campus or to any of the Student Services Departments at any of the Higher Education Centers.

\_\_\_\_\_  
Student Signature    Date

## VERIFICATION WORKSHEET INDEPENDENT STUDENT V-5 INSTRUCTIONS

Section C of the Verification Worksheet Independent Student V-5 requests information about the student and spouse, if applicable, 2016 Federal Tax Return. In order to provide that to the Southwestern College Financial Aid Office, you will need to use the IRS Data Retrieval Tool on the FAFSA **OR** request a 2016 Tax Return Transcript from the IRS. Below you will find instructions on how to utilize the IRS Data Retrieval Tool and how to request an IRS Tax Return Transcript or Verification of Non-filing Letter. Section D of the Verification Worksheet Independent Student V-5 is for the student and spouse, if applicable, that DID NOT file a 2016 Federal Tax Return and earned wages and, if applicable, must provide copies of all W-2's AND a Verification of Non-filing Letter. Submit your worksheet along with all requested documents to the SWC Financial Aid Office at the Chula Vista campus or to any of the Student Services Departments at any of the Higher Education Centers.

### Tax Filers: How to use the IRS Data Retrieval Tool

This is the quickest method to verify a 2016 Federal Income Tax Return.

1. Go to FAFSA on the Web at [www.fafsa.gov](http://www.fafsa.gov).
2. Login to your account using your FSA ID.
3. Once logged in, click the option to "Make FAFSA Corrections" as this will take you to your completed FAFSA information.
4. If federal taxes have been filed, go to the student tax information section and update your status to "already completed" taxes. Answer series of questions that follow. If "no" is answered to each question, an option will be provided to "link to IRS."
5. Enter your student FSA ID and password, click on the IRS link, and you will be taken to the IRS website and asked to enter your student information.
6. Enter your name and address information EXACTLY as it appears on your 2016 Federal Tax Return.
7. If the tool can locate tax information, click the option to "transfer now."
8. Electronically sign and submit the FAFSA corrections made verifying income. You must provide your FSA ID to sign electronically.
9. If you are unable to retrieve data, you will need to request an IRS Tax Return Transcript.

### Tax Filers: How to request an IRS Tax Return Transcript

If you cannot, or choose not to, utilize the IRS Data Retrieval Tool, you are required to provide a copy of your and your spouse, if applicable, 2016 Tax Return Transcript and W-2's.

1. Contact the IRS at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or call 1-800-908-9946.
2. Be sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
3. You will need your Social Security Number, date of birth, and the address on file with the IRS. Your address is the mailing address used when filing your tax return.
4. Alternatively, you can submit a completed paper 4506-T IRS Request for a Transcript of Tax Return that can be mailed or faxed to the IRS. You must check BOX 6a on the form to request a tax return transcript.

The transcript(s) requested, depending on the time of year, are generally received by you within 10 business days from the IRS's receipt of your request.

### Non-Tax Filers: How to request an IRS "Verification of Non-filing Letter"

Non-tax filers must submit a 2016 W-2 form for each source of employment income earned in the U.S. **AND** a "Verification of Non-filing Letter" from the IRS dated on or after October 1, 2017, attesting that you or your spouse, if applicable, did not file a 2016 IRS income tax return.

1. Contact the IRS at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or call 1-800-908-9946.
2. Request the "Verification of Non-filing Letter."
3. You can also submit a completed paper IRS Form 4506-T IRS Request for Transcript of Tax Return that can be mailed or faxed to the IRS. You must check BOX 7 on the form to request the "Verification of Non-filing Letter."