

Your Free Application for Federal Student Aid (FAFSA) was selected for Verification. Evergreen is required to compare information from your FAFSA with your 2015 IRS tax transcript (if the FAFSA Data Retrieval Tool (DRT) was not used) and/or other financial documents. Federal law requires that this is done before disbursement of federal aid (34 CFR, Part 668).

Student's Name      Last                      First                      M.I.

**A** \_\_\_\_\_  
Student's Evergreen ID Number

Student's Street Address (include apt. no.)      City      State      Zip Code

Home Phone and Cell Phone Numbers (include area code)

## SECTION 1. FAMILY INFORMATION

List below the people in your household. Include:

- Yourself **AND** your spouse if married.
- Your children, if any, if you will provide more than half of their support from July 1, 2017, through June 30, 2018, or if the children would be required to provide your information if they were completing a FAFSA for 2017–2018. Include children who meet either of these standards, even if they do not live with you.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.

### Yourself

Full Name	Date of Birth	College Attending in 2017-2018
		The Evergreen State College

### Spouse

Full Name	College Attending in 2017-2018

**Other family members in household (see details above) If more space is needed, attach a separate page.**

Full Name	Date of Birth	Relationship	College Attending in 2017-2018

## SECTION 2. 2015 TAX AND WAGE INFORMATION

(If you have already submitted 2015 information for 2016-17, contact our office)

Please check one box that applies to you and provide the requested documentation. Please see attached instruction sheet.

- ☐ I have filed taxes and have or will use the IRS Data Retrieval tool on my FAFSA. **(Currently down)**
  - ☐ I have filed taxes and I will provide a copy of my 2015 Return Transcript\*.
  - ☐ I filed a 2015 tax return and have some income from self-employment and I will provide a 2015 Return Transcript\* from the IRS and copies of all Schedule K-1(Form 1065) and W-2's if applicable.
  - ☐ I am not required to and will not file a 2015 tax return but I did work and will provide copies of 2015 W-2's.
  - ☐ I did not work in 2015.

*\*If you have difficulties obtaining your Return Transcript, we will accept a signed copy of your 1040, 1040A or 1040EZ.*

### Office of Financial Aid

2700 Evergreen Pkwy NW ▪ Olympia, WA 98505 ▪ phone 360-867-6205 ▪ fax 360-867-6576 ▪ email [finaid@evergreen.edu](mailto:finaid@evergreen.edu)

# 2016–2017 Verification Worksheet–Independent page 2 of 2

**Student's Name:** \_\_\_\_\_ **ID: A** \_\_\_\_\_

## SECTION 3. FOR 2015 – ADDITIONAL FINANCIAL INFORMATION

For the **STUDENT** column, enter the amount for the student. For the **SPOUSE** column, enter the amount for the spouse.

ENTER ONLY ANNUAL AMOUNTS OR \$0 <u>NO BLANKS.</u>	STUDENT	SPOUSE
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$	\$
Taxable student grant and scholarship aid <b>reported to the IRS on your 1040</b> in the adjusted gross income (AGI). Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. <b>Do not include untaxed combat pay.</b>	\$	\$
College cooperative education program earnings from work.	\$	\$
Child support paid.	\$	\$

## SECTION 4. FOR 2015 ALL APPLICANTS – UNTAXED INCOME

For the **STUDENT** column, enter the amount for the student. For the **SPOUSE** column, enter the amount for the spouse.

ENTER ONLY ANNUAL AMOUNTS OR \$0 <u>NO BLANKS</u>	STUDENT	SPOUSE
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. <b>Do not include</b> amounts reported in code DD (employer contributions toward employee health benefits).	\$	\$
Child support you received for all children. <b>Do not include</b> foster care or adoption payments.	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <b>Do not include</b> 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.	\$	\$
<b>Include</b> other untaxed income not reported, such as workers' compensation, disability, etc. <b>Do not include</b> student aid, earned income credit, additional 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, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$	\$
Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$	\$

**Certification and Signatures** WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

Student must sign and date this worksheet. Spouse is optional.

**Student's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Spouse's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## TAX AND WAGE INFORMATION INSTRUCTION SHEET

Keep this page for your records

Please read carefully before completing the verification process. We cannot review your financial aid file until we have received all requested information. Incomplete or missing documents may delay your financial aid award.

**If you have already submitted 2015 income information for your 2016-17 file, contact our office.**

- ☐ I have filed taxes and have or will use the IRS Data Retrieval tool on my FAFSA. **(Currently down)**
  - This means you have successfully transferred data from the IRS to your FAFSA.
  - When the application leaves FAFSA and takes you to the IRS site, you need to use the address listed on your tax return and list the main person who filed the return for the tool to work properly.
- ☐ I have filed taxes and I will provide a copy of my 2015 Tax Return Transcript\*.
  - Three ways of obtaining your transcript are: go to [www.irs.gov](http://www.irs.gov) and click on "Get a tax transcript," then click on "Get Transcript online," you need to use the address listed on your tax return and list the main person who filed the return for the tool to work properly. OR fill out Form 4506-T and request through mail. OR call 800-908-9946.
  - We will only accept a Tax Return Transcript; we cannot accept any other type of transcript the IRS may provide.
  - If you amended your taxes, we will need the Tax Return Transcript\* and a signed copy of your 1040X.
- ☐ I filed a 2015 tax return and have some income from self-employment and I will provide a 2015 Tax Return Transcript\* from the IRS and copies of all Schedule K-1(Form 1065) and W-2's if applicable.
  - If you do not have W-2's, submit a signed statement confirming your wages with this form.
- ☐ I am not required to and will not file a 2015 tax return, but I did work and will provide copies of 2015 W-2's.

*\*If you have difficulties obtaining your Return Transcript, we will accept a signed copy of your 1040, 1040A or 1040EZ.*

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