

2017-2018 (V1) Standard Verification Worksheet

Your 2017-2018 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. By law, before disbursing Federal Student Aid, we must compare your FAFSA with information on this verification document and with any other required documents from you, your parent(s) (if dependent) or your spouse (if married). If there are differences between your FAFSA information and your documentation provided, corrections may be required. Complete this verification form and submit it along with the supporting documentation to Rhodes Express as soon as possible, so that your financial aid will not be delayed.

Instructions: Please read carefully.

1. **Complete and sign this verification worksheet.** For dependent students, both you and at least one parent must sign. For independent students, you and your spouse (if applicable) must sign.
2. **Provide tax and/or income information for you, your parent(s) and/or spouse (if independent and married) as directed in the below table.**
3. **Submit your completed verification worksheet and other required documents to Rhodes Express** in person, by email at finaid@rhodes.edu or fax to (901) 843-3435. Alternately, you may mail the documents to:

Rhodes College
ATTN: Rhodes Express
2000 North Parkway
Memphis, TN 38112

- IMPORTANT:** ✓ When submitting documents, please reference the student's name and Rhodes ID #.
✓ Electronic documents should be in PDF format only and be clearly legible.

Tax return filers must provide 2015 income tax information by ONE of the following methods:

- ☐ **IRS Data Retrieval Tool:** Transfer tax information from the IRS to your FAFSA using the IRS Data Retrieval Tool (DRT) on www.fafsa.gov (some eligibility restrictions do apply). Step-by-step directions for the DRT can be found at: www.irsdataretrievaltool.com/irs-data-retrieval-tool-step-by-step-instructions.
- ☐ **2015 Tax Return Transcript:** Collect IRS tax return transcript(s) directly from the IRS by visiting www.irs.gov/Individuals/Get-Transcript to immediately print/download transcripts or order by mail. **Please do not order a third party return to be sent directly to the school.**
 - a. **Separate Returns:** If you and your spouse or your married parents filed separate tax returns, a tax return transcript for each must be submitted.
 - b. **Amended Returns:** If you, your parent and/or spouse (for independent students) filed an amendment to your tax return, you cannot use the IRS Data Retrieval Tool. Instead, you must submit a tax return transcript and a signed copy of the IRS Form 1040X.

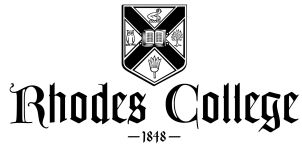
If you, your spouse or your parent(s) were not required to file taxes, you must provide:

- ☐ **2015 Verification of Non-filing Letter:** Collect non-filing letter directly from the IRS by visiting www.irs.gov/Individuals/Get-Transcript to immediately print/download or order by mail.
- ☐ **W-2's** for any income received

If you, your spouse or your parent(s) were a victim of IRS tax-related identity theft, you must provide:

- ☐ A **Tax Return DataBase View (TRDBV) transcript** obtained from the IRS by calling the IRS's Identity Protection Specialized Unit (IPSU) at 800-908-4490.
- ☐ A statement signed and dated by the tax filer that he/she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Please direct any questions to Rhodes Express by phone to 901-843-3278 or email finaid@rhodes.edu.



2017-2018 (V1) Standard Verification Worksheet

A. Student Information

Student's Last Name _____ First Name _____ MI _____ R# _____
Student's Rhodes ID Number _____

B. Household Information

Write the names of **all household members** based on your dependency status (dependent or independent) as determined by the FAFSA in the table below.

Dependent Students, should include:

- Yourself
- Your parent(s)/stepparent.
- Your (step)parent's other children if the parent will provide more than 50% of their support from 7/1/17 through 6/30/18, even if the children do not live with the parent.
- Other people who now live with your parents and your parents provide more than 50% of their support and will continue to do so through June 30, 2018 (i.e., grandparents).

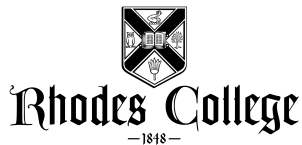
Independent Student, Include:

- Yourself
- Your spouse, if married
- Your (step)children if you and/or your spouse will provide more than 50% of their support from 7/1/17 through 6/30/18, even if they do not live with you.
- Other people who now live with you and/or your spouse and you provide more than 50% of their support and will continue to do so through June 30, 2018.

HOUSEHOLD MEMBER NAME (first and last)		AGE	RELATIONSHIP TO STUDENT	FULL NAME (no abbreviations) OF COLLEGE ATTENDING <small>See **College Attending instruction below</small>
Missy Jones (example)		18	Sister	University of Memphis
1			SELF	RHODES COLLEGE
2				
3				
4				
5				
6				
7				
8				

If you need more space, attach a separate page listing name, age, relation to student and college attending if applicable (please do not write on the back of this form).

****College Attending:** Enter the full college name (no abbreviations) for dependent household members enrolled at least half time in a degree, diploma or certificate program at an eligible postsecondary educational institution any time between July 1, 2017 and June 30, 2018. **This would not include your parent(s).**



2017-2018 (V1) Standard Verification Worksheet

Student's Last Name

First Name

MI

R#

Student's Rhodes ID Number

C. Income/Tax Information – See instructions for using the IRS Data Retrieval Tool or ordering a tax return transcript

Did the student file taxes for 2015?

- ☐ **YES**, student did file taxes (must submit tax return transcript **OR** use IRS Data Retrieval Tool on FAFSA)
- ☐ **NO**, student did not file taxes (must submit non-filing letter and review table below for completion if required)

Did the parent(s)/student's spouse file 2015 taxes?

- ☐ **YES**, parent(s)/student's spouse did file taxes (must submit tax return transcript **OR** use IRS Data Retrieval Tool on FAFSA)
- ☐ **NO**, parent(s)/student's spouse did not file taxes (must submit non-filing letter and review table below for completion if required)

For Non-filers: If you, your parent(s) or spouse were not required to file taxes, but had earned income from wages (i.e., student employment or other W-2 wages) in 2015, please complete the following.

Employee Name (household member)	Name of Employer	Total Earned in 2015	W-2 attached?
		\$	yes <input type="checkbox"/>
		\$	yes <input type="checkbox"/>
		\$	yes <input type="checkbox"/>
		\$	yes <input type="checkbox"/>

D. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information is on the FAFSA (or student's spouse if married) must sign/date below.

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

Student's Signature

Date

Parent's Signature – Dependent students only

Date

Spouse's Signature – Independent students only (if married)

Date