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Student ID number

## 2018-2019 V5 Verification Worksheet – Dependent Student

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) was selected for verification. Bluefield College Financial Aid Office will compare your FAFSA with the information on this form and with any other required documents. If there are difference between your FAFSA and verification documents, we will make the corrections electronically. If necessary, our office will request additional information.

**Please include the student’s name and Student ID number on all pages submitted.**

**Funding is limited and we strongly encourage you to submit all required documentation as quickly as possible.**

Name \_\_\_\_\_  
Last
First
Middle

Address \_\_\_\_\_  
Street Address
Apt. #
City
State
Zip Code

Date of Birth \_\_\_\_\_ Email Address \_\_\_\_\_

Primary Phone Number \_\_\_\_\_ Alternate Phone Number \_\_\_\_\_

**Section A: Household information**  
**Please complete all boxes for persons listed**

**List the people in your parent(s)’ household, including:**

- Yourself, even if you don’t live with your parent(s); **AND**
- Your parent(s) including a stepparent. If your legal parent(s) (biological or adoptive) are not married to each other and live together, provide information about both of them regardless of their gender; **AND**
- Your parent(s) other children, even if they do not live in your parent’s household, if your parent(s) will provide more than half of their support between July 1, 2018 and June 30, 2019, or the children would be required to provide parental information when applying for Federal Student Aid; **AND**
- Other people if they now live with your parent(s), your parent(s) provide more than half of their support and your parent(s) will continue to provide more than half of their support between July 1, 2018 and June 30, 2019.

Note: Include the name of the college for any household members, excluding your parent(s), 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, 2018 and June 30, 2019.

Full Name	Age	Relationship to Student	College/University
		Self	Bluefield College
		Parent/Stepparent	XXXXXXXXXXXXXXXX
		Parent/Stepparent	XXXXXXXXXXXXXXXX

Attach additional page(s) if necessary



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Name \_\_\_\_\_  
 Last First Middle

**Section B: Student Tax Return and Income Information**

1. **Select and verify your 2016 Federal IRS income tax information below:**

- Preferred Method to Verify Income: I used the IRS DATA Retrieval Tool (DRT) on the FAFSA website: [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and did not make any changes to the information transferred from the IRS.
- I have already completed a tax return, but was not able to use the DRT. An IRS Tax Return Transcript is attached.
- I will file a tax return, but have not filed at this time. I understand my application will not be finalized until this requirement is satisfied.
- I did not have any earned income in 2016.

2. If you were paid for working in 2016, but DID NOT file and are NOT REQUIRED to file a 2016 Federal IRS income tax return, list below the employers and/or sources of income and the amounts of all income received in 2016. *Attach copy of 2016 W2's.*

Employer's Name and/or Source(s) of Income	2016 Amount Earned
Total Amount of Income Earned From Work	\$

**Section C: Parent Tax Return and Income Information**

1. **Parents must select and verify their 2016 Federal IRS income tax information below.**

- My parent(s) used the IRS DATA Retrieval Tool (DRT) on the FAFSA website: [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and did not make any changes to the information transferred from the IRS.
- My parent(s) have already completed a tax return, but were not able to use the DRT. An IRS Tax Return Transcript is attached.
- My parent(s) will file a tax return, but have not filed at this time. I understand my application will not be finalized until this requirement is satisfied.
- My parent(s) did not have any earned income in 2016.

2. If your parent(s) was/were paid for working in 2016, but did not file and are not required to file a 2016 Federal IRS income tax return, list below the employers and/or sources of income and the amounts of all income received in 2016. *Attach copy of 2016 W2's.*

Employer's Name and/or Source(s) of Income	2016 Amount Earned
Total Amount of Income Earned From Work	\$

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Name \_\_\_\_\_  
Last
First
Middle

**Section D: High School Completions Status**

1. Select and provide one of the following documents that indicate the student’s high school completion status when the student will begin college in 2018-2019:

- A copy of the student’s high school diploma.
- A copy of the student’s final official high school transcript that shows the date when the diploma was awarded.
- For students who completed secondary education in a foreign country, a copy of the “secondary school-leaving certificate” or other similar document.
- A copy of the student’s General Educational Development (GED) certificate or GED transcript that indicates the student passed the exam, or a state-authorized high–school equivalent certificate.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.
- For a homeschooled student from a state where state law requires the student to obtain a secondary school completion credential for home school (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a homeschooled student from a state where state law does not require the student to obtain a secondary school completion credential for home school (other than a high school diploma or recognized equivalent), a transcript or the equivalent, signed by the student’s parent or guardian, that lists the secondary school course the student completed and documents the successful completion of a secondary school education in a home school setting.
- Copy of military form DD214.

\*\* If the student is unable to obtain the documentation listed above, he or she must contact the financial aid office. \*\*

Please review all the information on this form and any supporting documentation for completeness, including all signatures.

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

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

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_

\*Please note that email is not always a secure method of communication and may inadvertently expose your information if misdirected. Bluefield College suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery. If you choose to submit information through email, Bluefield College will not be responsible for any exposure of data.

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Student ID number

Name \_\_\_\_\_  
Last
First
Middle

**Section E: Identity & Statement of Educational Purpose**

Please complete one of the following options below based on your convenience:

1. The student must appear in person at Bluefield College to verify his or her identity by presenting valid government-issued photo identification (ID), such as, but not limited to, a driver's license, or other state-issued ID, or passport. **The institution will maintain a copy of the student's photo ID** that is annotated with the date it was received and reviewed including the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, in the presence of the institutional official, the following:

**STATEMENT OF EDUCATIONAL PURPOSE**

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

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

Authorized BC Official \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_  
Last
First
Middle

2. If the student is unable to appear in person at Bluefield College to verify his or her identity, the student must provide:

- A. A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- B. The **original** notarized Statement of Educational Purpose provided below.

**STATEMENT OF EDUCATIONAL PURPOSE**

I certify that I (printed 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 and to pay the cost of attending Bluefield College for 2018-2019.

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



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Student ID number

**NOTARY'S CERTIFICATE OF ACKNOWLEDGMENT**

State of \_\_\_\_\_ city/county of \_\_\_\_\_ on \_\_\_\_\_,

before me, \_\_\_\_\_ personally appeared, \_\_\_\_\_  
Notary's Name Printed Name of Signer

and provided to me on basis of satisfactory evidence of identification \_\_\_\_\_  
Type of government-issued photo ID provided

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal** \_\_\_\_\_  
Notary's Signature

My commission expires on \_\_\_\_\_  
Date

Seal

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Student ID number

## IRS Tax Return Transcript Information:

A **2016 IRS Tax Return Transcript** may be obtained through:

- Online Request – Go to [www.irs.gov](http://www.irs.gov). Under the Tools heading on the IRS homepage, click on the “Get a tax transcript” option. You can choose between two options:
  - Get Transcript by Mail- transcripts arrive in 5 to 10 calendar days at the address on file
  - Get Transcript ONLINE – requires creation of an account with personal identifiers
- Telephone Request – 1-800-908-9946
- Paper Request form – IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2016 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the parents filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Return Transcript(s)** must be provided for each.

### **\*\* Verification of 2016 Income Information for Individuals with Unusual Circumstances \*\***

#### **Individuals Who Filed an Amended IRS Income Tax Return**

An individual who filed an amended IRS income tax return for tax year 2016 must provide:

- A signed copy of the IRS Form 1040X that was filed;
- A signed copy of the original return that was filed or a tax return transcript; **and**
- Transcript obtained from the IRS that list tax account information.

#### **Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

\*If you are a victim of IRS tax-related identity theft, be sure to contact the IRS Identity Protection Specialized Unit at **800-908-4490**.

#### **Individuals Who Filed Non-IRS Income Tax Returns**

An individual who filed or will file a 2016 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer’s income and tax information required to be verified for tax year 2016; **or**
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2016 income tax return(s).

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Student ID number

**IRS Tax Return Transcript Information:****Extension Filers**

An individual who is required to file a 2016 IRS income tax return but have not filed because they have been granted a filing extension by the IRS beyond the automatic six-month extension for the tax year. These individuals must provide:

- Signed statement certifying that the individual:
  - Attempted to obtain the VNF from the IRS or other tax authorities and was unable to obtain the required documentation; and
  - Has not filed a 2016 income tax return and list the sources of and 2016 income, and the amount of income from each source. If self-employed, the signed statement must also include the amount of AGI and U.S. income tax paid for the applicable tax year;
- Copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," the individual filed with the IRS for the appropriate tax year;
- Copy of IRS Form W-2 for each source of 2016 or 2017 employment income received or an equivalent document.