Financial Aid Office
121 Oswald Bldg. / 470 Cooper Dr.
Lexington, KY 40506
855-246-2477
Bluegrass-FinancialAid@kctcs.edu

2014-15 (V5) Aggregate Verification Worksheet

Your 2014-2015 FAFSA was selected for review in a process called Verification. In this process, your school will be comparing information from your FAFSA with copies of your (and your spouse's if you are married, or your parent's if you are dependent) 2013 Federal tax transcript, and/or with W-2 forms and/or with other financial documents. Complete this verification worksheet and submit it, along with other required documents, to the financial aid office as soon as possible to avoid a delay in processing your financial aid. If you need help, contact the financial aid office at your school. *Your school must review the requested information under the financial aid program rules (34 CFR, Part 668) and submit corrections if necessary.*

A. Student Information

_____
Last Name First Name MI

_____
Address (include apt. #)

_____
City State Zip Code

_____
Student ID Number

_____
Social Security Number

_____
Date of Birth

(_____)_____
Phone Number (include area code)

B. Family Information

Write the names of ALL household members* in the section below. **LIST YOURSELF FIRST!** Also write in the college name for any family member, excluding your parent, who will attend college at least half time between July 1, 2014 and June 30, 2015, and will be enrolled in a financial aid eligible program. If you need more space, attach a separate page.

******Independent Student***: List the people in **your household**. List yourself first, then your spouse if you have one, and your children **if you will provide more than half of their support from July 1, 2014 through June 30, 2015** even if they do not live with you. Include other people **only** 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, 2015.

******Dependent Student***: List the people in your **parent's household.** List yourself first, then your parent(s)/stepparent(s) (even if you do not live with them), and your parent/stepparent's other children who live with them. Include parent/stepparent's other children who do not live with them **if** your parent/stepparent will provide more than half of their support from July 1, 2014 through June 30, 2015 or **if** the children would be required to give parental information when applying for federal student aid. List any other people who now live in your parent/stepparent's household **if** your parent/stepparent provides more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
(example) Missy Jones	*24*	*Wife*	*City University*	*(Yes or No)*
		SELF	*KCTCS*	

C. Income and Financial Information to Be Verified

☐ **Check this box if anyone in the household listed in Section B received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) at any time during 2012 or 2013**. If asked by my school, I will provide documentation from the agency that issued the SNAP benefits during 2012 or 2013.

☐ **Check this box if you, the student, or your parent included in the household in Section B, paid child support in 2013.** Indicate below the name of the person who paid child support, the name of the person to whom child support was paid, the name of the child/children for whom child support was paid, and the total amount of child support that was paid in 2013. If asked by my school, I will provide documentation of the payment of child support.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Child Support was Paid	Amount of Child Support Paid in 2013
(example) Marty Jones	*Chris Smith*	*Terry Jones*	*$6000*

☐ **Check this box IF A TAX RETURN WAS FILED and complete the section below. If you (and your spouse or parents, if applicable) filed a 2013 tax return, check all the boxes that apply (see additional instructions included with worksheet).**

STUDENT	SPOUSE	PARENT	
☐	☐	☐	**used** the IRS Data Retrieval Tool (DRT) in *FAFSA on the Web* to transfer 2013 IRS income tax info to the FAFSA when I first submitted the FAFSA.
☐	☐	☐	**did not use** the IRS DRT in *FAFSA on the Web* when FAFSA was first submitted, **but used** DRT to transfer income tax info to the FAFSA on (MM/DD/YY) _____/_____/_____.
☐	☐	☐	**is unable or chose not to use** the IRS DRT and **has included** a 2013 IRS **Tax Return** transcript along with this worksheet to the college financial aid office.

☐ **Check this box IF A TAX RETURN WAS NOT FILED and complete the section below. If you (and your spouse or parents, if applicable) are not required to file a 2013 federal tax return, check all the boxes that apply.**

STUDENT	SPOUSE	PARENT	
☐	☐	☐	**was not employed** and earned no income from work in 2013.
☐	☐	☐	**was employed and earned income** from work in 2013 but **was not required to file** a tax return. List **all** employers in the section below even if you did not receive a W-2 Form. Attach all W-2 Forms received. ***Attach a separate sheet if more space is needed.***

Employee Name	Employer Name	2013 Amount Earned	W-2 Form Received?
(example) John Smith	*Suzy's Body Shop*	*$2000*	*(Yes or No)*

D. Verification of Student's High School Completion Status

You, the student, <u>must</u> provide one of the following documents to verify high school completion status.

- ☐ Copy of high school diploma
- ☐ Copy of final official high school transcript indicating graduation date
- ☐ Copy of GED certificate
- ☐ Copy of "secondary school leaving certificate" or similar document if graduated in a foreign country
- ☐ Copy of a college academic transcript indicating completion of at least a two-year program acceptable for full credit toward a bachelor's degree
- ☐ For a home schooled student from a state where state law requires the 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.
- ☐ For a home schooled student from a state where state law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its equivalent), a transcript or the equivalent, signed by the student's parent or legal guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting

E. Student's Identity Statement of Educational Purpose

- ☐ **You, the student, must appear at the financial aid office to sign a "Statement of Educational Purpose" in the presence of an authorized college financial aid official. You are required to present a valid, government-issued photo ID (such as a driver's license, other state-issued ID or passport) which must be photocopied.**

- ☐ **If you cannot appear in person, you must submit am officially notarized "Statement of Educational Purpose" (you must submit the original, not a photocopy) along with a photocopy of the valid, government-issued ID acknowledged in the notary statement.**

F. Certification and Signatures

Each person signing this worksheet certifies that all information reported on it is complete and correct. If student is dependent, at least one parent must sign.

Your financial aid cannot be processed until the financial aid office receives the required Verification documents. Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668), and submit corrections if necessary.

<u>WARNING</u>: *If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both*.

_____ _____

Student's Signature Date Parent's Signature (Dependent Students Only) Date

IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE
(TO BE SIGNED WITH A NOTARY)

_____ _____

Last Name **First Name** **MI** **SSN OR Student ID Number**

If the student is unable to appear in person at the _____
(Name of Postsecondary Educational Institution)

to verify his or her identity, the student must provide via mail (*emailed or faxed forms will not be accepted*):

(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 _____ *am the individual signing this*
(Print Student's Name)

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

_____ *for 2014-2015.*
(Name of Postsecondary Institution)

_____ _____
(Student's Signature) (Date)

_____
(Student's ID Number)

Notary's Certificate of Acknowledgement

State of _____ City/County of _____

On _____, before me, _____
(Date) (Notary's Name)

Personally appeared, _____, and provided to me
(Printed Name of Signer)

on basis of satisfactory evidence of identification _____
(Type of Government-Issue Photo ID provided)

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

WITNESS my hand and official seal

(seal)

_____
(Notary Signature)

My commission expires on _____
(Date)

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Bluegrass
Community & Technical College
HIGHER EDUCATION BEGINS HERE

2014-2015 INSTRUCTIONS FOR VERIFYING TAX INFORMATION

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web. If you have not already used the tool, go to www.fafsa.gov, log in and select "Make FAFSA Corrections." In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2013 IRS income tax information into your FAFSA. You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the DRT.

If you are unable or choose not to use the IRS DRT, you **must** obtain an IRS tax return transcript (copies of your original Form 1040 tax return are not acceptable for verification purposes). In most cases, for electronic filers, a 2013 IRS Tax Return Transcript is available from the IRS within 2-3 weeks after filing. If you filed a paper return, expect 8-11 weeks for your transcript to be available.

To request an IRS tax return transcript, go to www.IRS.gov and click the "Get Transcript of Your Tax Records" link. Make sure you request the "**Tax Return**" transcript and **NOT** the "Tax Account" transcript. Use the Social Security Number and date of birth of the first person listed on the 2013 tax return and the address on file with the IRS (normally the address used when your 2013 IRS tax return was filed).

You may select "Get Transcript ONLINE" and immediately print your transcript or Get Transcript by MAIL. Provide the transcript to the financial aid office along with your Verification Worksheet.

If you are unable or choose not to use the DRT and cannot access your IRS **"Tax Return"** transcript online, you must call the IRS at 1-800-908-9946 to receive a transcript.

Special Situations:

Amended Returns-If you filed an amended tax return, you must submit a signed copy of your original Form 1040 **OR** an IRS Tax Return Transcript **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return" along with your completed Verification Worksheet.

Victims of IRS Identity Theft-A victim of IRS identity theft who is not able to obtain a 2013 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490 to receive a printout of the tax return by mail. Submit this printout along with documentation of the identity theft to the financial aid office along with your Verification Worksheet.

Non-IRS Income Tax Returns-An individual who filed or will file a 2013 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a signed copy of the 2013 income tax return along with the Verification Worksheet.

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