

# Verification

## Dependent Form (B)

Your FAFSA application has been selected for review in a process called **Verification**.\*

**Please submit the following items. In order to maximize eligibility for financial aid, return this information by the due date listed under the To Do items in your Titan Web account.**

- Completed and signed 2017-2018 Verification – Dependent Form (B)**
- 2015 W-2 form(s) for student**
- 2015 W-2 form(s) for parent(s) (Schedule C or F if business or farm owner)**

In most cases, for electronic tax return filers, 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2015 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 2015 IRS income tax returns, the IRS DRT cannot be used and the **2015 IRS Tax Return Transcript(s)** must be provided for each.

\* If you or the IRS made adjustments to your tax return after you initially filed, you must attach **a tax return transcript of the original transaction -AND- a signed copy of your completed 1040X**.

**For Non Filers:** Provide documentation from the IRS (Form 4506-T) dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS. <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and return to the appropriate service center listed on page 3.

Return all completed forms to the Financial Aid Office via mail, in person, or fax.

### Important Notes:

- You must answer all questions. Write \$0 or N/A if the question does not apply. Leaving a question blank will delay processing as all fields need to be filled in.
- As an alternative to requesting a federal tax transcript, the student and parent may login to a submitted FAFSA and choose to use the IRS Data Retrieval Tool. **Please note: if you make changes to the FAFSA fields after using the IRS Data Retrieval Tool, a copy of your federal tax return transcript will still be required.**
- Requested items may be submitted after the due date indicated on the To-Do item. However, this could cause delays in processing and/or affect the amount of the aid awarded. Please allow 2-4 weeks for processing to be completed and your eligibility for aid to be determined.

During the verification process, we compare information from your Free Application for Federal Student Aid (FAFSA) with your signed verification form as well as student and parent 2015 FEDERAL Tax Return Transcript and W-2 forms.

The law states we have the right to request this information before awarding federal aid based on program rules (CFR Title 34, part 668). If there are differences between the information you provided on your FAFSA and that on your financial documents, we will submit the correct information to the Central Processing Servicing Center on your behalf.

# 2017 – 2018 Verification Dependent Form (B)

## A. Student Information

Last Name	First Name	M.I.	Student ID #
Street Address	City	State	ZIP Code
			Phone Number

## B. Family Information

**In the box provided below, list the people that your parent(s) will support between July 1, 2017 and June 30, 2018. Include:**

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents
- If your parents are separated or divorced, include only the parent/stepparent whose information you were required to provide on the financial aid application.
- If your legal parents are not married and live together provide information for both parents
- Your parent(s)' other children, even if they don't live with your parent(s), if (a) your parent(s) will provide more than half of their support from July 1, 2017 through June 30, 2018, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- Other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.
- **In addition to listing all members of your household, include the name of the college for any family member, excluding parents, who will be attending college at least half-time between July 1, 2017 and June 30, 2018, and will be enrolled in a degree or certificate program.**

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Name	Relationship	Age	College Attending (2017-2018)
	Self		UW Oshkosh

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## C. Student's Tax Forms and Income Information (Check appropriate box)

- I filed 2015 taxes and used the IRS Data Retrieval Tool to complete my FAFSA
- I will not file and am not required to file a 2015 Federal Tax Return. Provide documentation from the IRS dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS. To access form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and return to the appropriate service center listed on page 3.

\_\_\_ Check here if confirmation of nonfiling is provided.

\_\_\_ Check here if confirmation of nonfiling will be provided later.

If you did not file, and are not required to file a 2015 Federal tax return, list below your employer(s) as well as any income received in 2015. **Include W-2s. If NONE, enter "0". You must complete Section G.**

Source	2015 Amount

**D. Parent(s)' Tax Forms and Income Information** (Check appropriate box)
 I filed 2015 taxes and used the IRS Data Retrieval Tool to complete my FAFSA

 I will not file and am not required to file a 2015 Federal Tax Return. Provide documentation from the IRS dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS. To access form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and return to the appropriate service center listed on page 3.

 Check here if confirmation of nonfiling is provided.

 Check here if confirmation of nonfiling will be provided later.

If your parent(s) did not file and is/are not required to file a 2015 Federal tax return, list below your parent(s) employer(s) and any income they received in 2015. **Include W-2s. If NONE, enter "0". You must complete Section G.**

Source	2015 Amount	Earned By

**E. Worksheet.** Fill in the ANNUAL amounts for the items listed below. (Blank is not an answer - you must fill in each square.)

2015 Additional Financial Information											
Parent(s)'		Student's									
\$	Education credits (American Opportunity and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 33.	\$									
\$	Child support <b>paid</b> because of divorce or separation or as a result of a legal requirement. Do not include support for children in your (or your parents') household, as listed in Section B. List children for whom child support was paid. (attach additional sheet if necessary)  <div style="text-align: center;"> <table> <tr> <td><b>Paid</b></td> <td><b>To (name of other parent)</b></td> <td><b>For (name of child)</b></td> </tr> <tr> <td>\$ _____ /year</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>\$ _____ /year</td> <td>_____</td> <td>_____</td> </tr> </table> </div>	<b>Paid</b>	<b>To (name of other parent)</b>	<b>For (name of child)</b>	\$ _____ /year	_____	_____	\$ _____ /year	_____	_____	
<b>Paid</b>	<b>To (name of other parent)</b>	<b>For (name of child)</b>									
\$ _____ /year	_____	_____									
\$ _____ /year	_____	_____									
\$	Taxable earnings from need-based employment programs such as Federal Work Study and need-based employment portions of fellowships and assistantships.	\$									
\$	Taxable grant and scholarship aid <b>reported to the IRS in the adjusted gross income.</b> Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$									
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$									
\$	Earnings from work under a cooperative education program offered by a college. <b>YOU MUST PROVIDE DOCUMENTATION OF THIS EMPLOYMENT, i.e. AN AGREEMENT WITH THE COLLEGE.</b>	\$									
2015 Untaxed Income											
\$	Payments to tax-deferred pension and savings plans paid directly or withheld from earnings (including but not limited to amounts on W-2 forms in Boxes 12a-12d, codes D, E, F, G, H and S. Do not include DD).	\$									
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-line 28 + line 32 or 1040A-line 17.	\$									
\$	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.	\$									
\$	Annual child support received for any of your children. <b>Do not include</b> foster care or adoption payments.	\$									
\$	Annual housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <b>Don't 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, DIC; VA Ed Work-Study allowances.	\$									
\$	Annual other untaxed income not reported in items 94a through 94h, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040-line 25. <b>Don't include</b> extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity 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. This includes money that you received from a parent whose financial information is not reported on the FAFSA and that is not part of a legal child support agreement.	\$									
\$	If there are amounts on lines 15a or 15b of your 1040 (or lines 11a or 11b of 1040A) what portion, if any, was a <i>rollover</i> ? Write in N/A if no amounts on those lines, or if 1040EZ or no tax return was filed. Otherwise, <b>attach proof of Rollover</b> to this form.	\$									
\$	If there are amounts on lines 16a or 16b of your 1040 (or lines 12a or 12b of 1040A) what portion, if any, was a <i>rollover</i> ? Write in N/A if no amounts on those lines, or if 1040EZ or no tax return was filed. Otherwise, <b>attach proof of Rollover</b> to this form.	\$									

**F. Business Asset Statement**

Does anyone in your household (listed in section B) own and control a small business/investment farm?  Yes  No  
If yes, does this small business have more than 100 full-time or full-time equivalent employees?  Yes  No

If the small business has more than 100 employees, what is the net value of the business? \$\_\_\_\_\_

**G. Low Income Statement**

**If you or your parents did not file a 2015 Federal tax return, and did not list any other sources of income/resources, attach a separate statement explaining how the household was able to live on little or no income. Please be specific and provide amounts and sources of income.**

**H. Signatures**

*\* Requires at least one parent signature*

By signing this worksheet, we certify that all the information reported to qualify for federal student aid is complete and correct.

**WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**

\_\_\_\_\_  
Student Date Parent Date

**Return completed form with Federal Tax Return Transcripts and W2s to:**

UW Oshkosh Financial Aid Office  
Dempsey Hall 104  
800 Algoma Blvd  
Oshkosh, WI 54901-8604  
Fax: 920-424-0284  
Email: [fao@uwosh.edu](mailto:fao@uwosh.edu)