

2017-2018 Dependent Student Verification Form (Group V1)

Your FAFSA (Free Application for Federal Student Aid) has been selected under federal regulations for verification. The verification process will be conducted by SMU in accordance with the U. S. Dept. of Education's Verification Regulations (Title 34 CFR 668, Subpart E). Failure to complete verification may delay awarding and disbursement of funds to your student account. If any additional information is needed to resolve conflicting or unclear data, you will be notified by the SMU Financial Aid office.

Mail: SMU Financial Aid
Division of Enrollment Services
P. O. Box 750181, Dallas, TX 75275-0181

Email: FA.Verification@mail.smu.edu
In person: at the Financial Aid Front Desk on the 1st floor of the Laura Lee Blanton Bldg.

STEP 1: STUDENT INFORMATION

Full Legal Name _____	SMU ID Number _____	Last 4 digits of SSN _____
Home Address (number, street, city, state, zip code) _____	Student E-mail Address _____	Phone Number _____

STEP 2: NUMBER IN HOUSEHOLD & NUMBER IN COLLEGE

In the table below, list individuals living/residing in your parent's household meeting FAFSA regulations below:

- ☒ **Yourself**
- ☒ **Your parent(s):** biological, adoptive, or step-parents. [If parents have remarried others, list the primary parents you live with, do not list both biological parents if they're married to other individuals. If parents are divorced, list only the parent with whom you live with (custodial parent)].
- ☒ **Your parents' other children - IF 1)** Your parents will provide over 50% of their financial support from July 1, 2017 to June 30, 2018; and/or **2)** They are considered **DEPENDENT** according to **FAFSA rules** for July 1, 2017 to June 30, 2018.
- ☒ **Any other people** who live with your parents and who will receive over 50% of their financial support from them now through June 30, 2018.
- ☒ **Under college/university/post-high school institution** list the institution household members, excluding your parents, who will be enrolled at least as a half- time student from July 1, 2017 through June 30, 2018. **Do not include high schools/secondary schools.**

Full Name	Age	Relationship	2017-2018 College/Univ./Inst.
1.		Self	SMU
2.		Parent 1	Not applicable to parents
3.		Parent 2 (if applicable)	Not applicable to parents
4.			
5.			
6.			
7.			
8.			
9.			
10.			

In nearly all cases, only the IRS Data Retrieval tool or Tax Return Transcript will be accepted for verification. Please review the criteria below; if any apply, you will be ineligible to use the Data Retrieval Tool:

1. Filed an amended 2015 tax return (IRS Form 1040X)
2. Filed a foreign or Puerto Rican 2015 tax return
3. Had a change in marital status after December 31st, 2015
4. You're married, but filed as "Head of Household" or "Married filing separately"
5. You selected "Unmarried, Living Together" on the FAFSA
6. Entered an invalid SSN on the FAFSA. or entered it as all 0's

To use Tool: go to [FAFSA.gov](https://www.irs.gov/individuals/get-transcripts), log in w/ your PIN. Generally, IRS Data is available 1-3 weeks if e-filed; 8-11 weeks otherwise (depends on balance owed & refund).

If you are ineligible or choose not to use the Data Retrieval Tool, you must request an IRS Tax Return Transcript: www.irs.gov/individuals/get-transcripts or 800-908-9946. Send ALL pages, front and back. Save a copy for your records before sending to SMU.

STEP 3: STUDENT TAX INFO – SELECT ONLY ONE OPTION IN EITHER SECTION A OR B THAT APPLIES TO YOUR TAX FILING STATUS AND PROCEED TO STEP 4.

SECTION A. You filed taxes for the 2015 tax year, **check only one box** from the options below and proceed to STEP 4.

OPTION 1 - IRS DATA RETRIEVAL TOOL

- ☐ I have already used the IRS Data Retrieval Tool.
- ☐ I will make a FAFSA correction and use the IRS Data Retrieval Tool as soon as possible.

OPTION 2 - IRS TAX RETURN TRANSCRIPT

- ☐ My IRS Tax Return Transcript is attached.
- ☐ I have ordered an IRS Tax Return Transcript and it is being sent to SMU.

OPTION 3 – AMENDED TAX RETURN

- ☐ I have filed an Amended Tax Return; my IRS Tax Return Transcript 1040 AND signed 1040X are attached.
- ☐ I have filed an Amended Tax Return; my IRS Tax Return Transcript 1040 AND signed 1040X will be sent to SMU.

SECTION B. You did not meet requirements to file a 2015 tax return according to IRS rules, complete Option 1 or 2 and proceed to STEP 4.

OPTION 1 – WAGES EARNED IN 2015 BUT DIDN'T FILE TAXES – Complete the table, attach all 2015 W-2's **AND** request 2015 Non-filer Statement from the IRS :

Name of Employer or Source of Income	2015 Wages earned	W-2 provided?	W-2 Attached?
	\$		
	\$		
	\$		

OPTION 2 – NO WAGES/INCOME EARNED IN 2015

- ☐ Check here certifying that you earned \$0 in wages for calendar year 2015.

STEP 4: PARENT TAX INFO – SELECT ONLY ONE OPTION IN EITHER SECTION A OR B THAT APPLIES TO YOUR TAX FILING STATUS AND PROCEED TO STEP 5.

SECTION A. You filed taxes for the 2015 tax year, **check only one box** from the options below and proceed to STEP 5.

OPTION 1 - IRS DATA RETRIEVAL TOOL

- ☐ I have already used the IRS Data Retrieval Tool.
- ☐ I will make a FAFSA correction and use the IRS Data Retrieval Tool as soon as possible.

OPTION 2 - IRS TAX RETURN TRANSCRIPT

- ☐ My IRS Tax Return Transcript is attached.
- ☐ I have ordered an IRS Tax Return Transcript and it is being sent to SMU.

OPTION 3 – AMENDED TAX RETURN

- ☐ I have filed an Amended Tax Return; my IRS Tax Return Transcript 1040 AND signed 1040X are attached.
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SECTION B. You did not meet requirements to file a 2015 tax return according to IRS rules, complete Option 1 or 2 and proceed to STEP 5.

OPTION 1 – WAGES EARNED IN 2015 BUT DIDN'T FILE TAXES – Complete the table, attach all 2015 W-2's **AND** request 2015 Non-filer Statement from the IRS:

Name of Employer or Source of Income	2015 Wages earned	W-2 provided?	W-2 Attached?
	\$		
	\$		
	\$		

OPTION 2 – NO WAGES/INCOME EARNED IN 2015

- ☐ Check here certifying that you earned \$0 in wages for calendar year 2015.

STEP 5: RECEIPT OF SNAP BENEFITS

Please certify below if someone listed in the household section in Step 2 received SNAP benefits (the Supplemental Nutrition Assistance Program, formerly known as Food Stamps) in 2015 or 2016 (circle yes or no): **YES / NO**

STEP 6: CHILD SUPPORT PAID

Please certify below if one or both of your parents listed in the household section in Step 2 paid child support to someone outside of your household in 2016 (circle yes or no): **YES / NO**

If YES, please complete the fields below:

Name of the adult paying child support	
Name of the adult to whom child support was paid	
Name <u>and</u> Age of the child(ren) for whom child support was paid	1.
	2.
	3.
	4.
The amount of child support paid	\$

STEP 7: CERTIFICATIONS AND SIGNATURES

SIGNING BELOW CERTIFIES THAT ALL INFORMATION PROVIDED HEREIN IS COMPLETE AND ACCURATE.

Student's Signature *Date*

Parent's Signature *Date*

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