

### 2017-2018 Verification Worksheet Dependent Students

Your application was selected for review in a process called "Federal Verification." In this process, Carnegie Mellon is comparing information from your FAFSA to information contained in your CSS PROFILE and federal tax data transferred from IRS DRT, 2015 IRS Tax Return(s) or 2015 IRS Tax Return Transcript(s), and with W-2 forms or other financial documents. The information that you submitted in the application process must be reviewed for accuracy and free from any conflicting documentation or inconsistencies before finalizing your financial aid eligibility. If there are differences between your application information and your financial documents, we will submit the required changes on your behalf.

Complete the sections of this form that are applicable to your own family situation. Please pay careful attention to the instructions provided in each section.

**Section I: STUDENT/FAMILY INFORMATION.** All students should complete this section.

**Section II: STUDENT TAX AND INCOME INFORMATION.** All students should complete the fields related to your IRS Tax filing status for 2015 in this section.

**Section III: PARENT TAX AND INCOME INFORMATION.** All parent(s) should complete the fields related to their IRS Tax filing status for 2015 in this section.

Once this form is complete, submit it to the Student Financial Aid Office as soon as possible, so that finalization of your financial aid won't be delayed.

### SIGNATURES

Each person signing this form certifies that all information reported on it is complete and correct. The student and at least one parent must sign.

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### SECTION I: STUDENT/FAMILY INFORMATION

Student Name: \_\_\_\_\_ Student Andrew ID: \_\_\_\_\_

Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Street Address/P.O. Box

mm/dd/yyyy

\_\_\_\_\_

City, State, Zip, Country

Phone Number: \_\_\_\_\_

Complete the chart below with the information about the people in your household that your parent(s) will support between July 1, 2017 and June 30, 2018. Include the following:

- Yourself
- Your parents, even if you do not live with your parents, and
- Your parents' other children if (a) your parents will provide more than half of their support from July 1, 2017 through June 30, 2018, and
- Other people if they now live with your parents, your parents will provide more than half of their support, and your parents will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.
- Report your household members in college if they will attend, for at least 6 credit hours (or half time) in at least one term between July 1, 2017 and June 30, 2018, a program that leads to a college degree or certificate.

Always include yourself as a college student. You may include others only if they will attend, at least half time in 2017-2018, a program that leads to a college degree. We will verify the number reported in college. Please promptly notify us if there is any change.

Full Name (including parents)	Age	Relationship to Applicant	College/University attended by Dependent (at least half time) in 2017-2018 (excluding parents)
		<i>Self</i>	

## SECTION II: STUDENT TAX AND INCOME INFORMATION

1. Complete this section if you **filed or will file** a 2015 IRS Income Tax Return (Form 1040, 1040A, 1040EZ).

If you filed a 2015 IRS Income Tax Return and **did not use** the IRS DRT in FAFSA on the WEB, you are required to submit a signed paper copy of the 2015 IRS Tax Return(s) or the 2015 IRS Tax Return Transcript(s) to complete federal verification. We also require legible copies of all your W-2's and wage statements.

Check the box that applies:

- You **have used** the IRS DRT in FAFSA on the Web to transfer 2015 IRS income tax return information into your FAFSA.
- You **were unable to use** the IRS DRT in FAFSA on the Web, and instead will provide the school with a signed paper copy of the 2015 IRS Tax Return or the 2015 IRS Tax Return Transcript.

A **2015 IRS Tax Return Transcript** may be obtained through one of the following ways:

- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- Get Transcript ONLINE – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

- Check here if your IRS Tax Return or IRS Tax Transcript is attached to this worksheet
- Check here if your IRS Tax Return or IRS Tax Transcript will be submitted later to us. Note: Verification cannot be completed until the IRS Tax Transcript has been submitted.
- Check here if you filed a tax return other than an IRS form, such as a foreign or Puerto Rican tax form. Note: If you filed a tax return other than an IRS form, the income information (converted to U.S. dollars) must be used to complete a U.S. income Tax Return. The signed U.S. Tax Return Conversion must be submitted to complete federal verification.

2. Complete this section if **you will not file and are not required to file** a 2015 income tax return with the IRS.

Check the box that applies:

- You were not employed and had no income earned from work in 2015.
- You were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. (Provide copies of all 2015 IRS W-2 forms issued to the parents by their employers). List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2015
		\$
		\$
		\$
		\$
		\$
<b>Total Amount of Income Earned from Work:</b>		\$

### SECTION III: PARENT TAX AND INCOME INFORMATION

1. Complete this section if your parent(s) **filed or will file** a 2015 IRS Income Tax Return (Form 1040, 1040A, 1040EZ).

If your parent(s) filed a 2015 IRS Income Tax Return and **did not use** the IRS DRT in FAFSA on the WEB, they are required to submit a signed paper copy of the 2015 IRS Tax Returns(s) or 2015 IRS Tax Return Transcript(s) to complete federal verification. We also require legible copies of all parent(s) W-2's and wage statements. If parents are married, and separate 2015 Tax Returns were filed, 2015 IRS Tax Return Transcripts must be submitted for each parent.

Check the box that applies:

- Parent(s) **have used** the IRS DRT in FAFSA on the Web to transfer 2015 IRS income tax return information into the student's FAFSA.
- Parent(s) **were unable to use** the IRS DRT in FAFSA on the Web, and instead will provide the school with a signed paper copy of the 2015 IRS Tax Return(s) or 2015 IRS Tax Return Transcript(s).

A **2015 IRS Tax Return Transcript** may be obtained through one of the following ways:

- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
  - Get Transcript ONLINE – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
  - Automated Telephone Request – 1-800-908-9946
  - Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T
- Check here if parent(s) IRS Tax Return or IRS Tax Transcript is attached to this worksheet
  - Check here if the parent(s) IRS Tax Return or IRS Tax Transcript will be submitted later to us. Note: Verification cannot be completed until the IRS Tax Transcript has been submitted.
  - Check here if parent(s) filed a tax return other than an IRS form, such as a foreign or Puerto Rican tax form. Note: If they filed a tax return other than an IRS form, the income information (converted to U.S. dollars) must be used to complete a U.S. income Tax Return. The signed U.S. Tax Return Conversion must be submitted to complete federal verification.

2. Complete this section if the parents **will not file and are not required to file** a 2015 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed and neither had income earned from work in 2015.
- One or both parents were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. (Provide copies of all 2015 IRS W-2 forms issued to the parents by their employers). List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2015
		\$
		\$
		\$
		\$
		\$
<b>Total Amount of Income Earned from Work:</b>		\$