



# 2018–2019 Independent Aggregate Verification Worksheet

## Financial Aid Office

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Your 2018–2019 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called “Verification”. Section 34 CFR 668.54 of the Federal law says that before awarding Federal aid, we have the right to ask you to confirm information reported on your FAFSA using this worksheet, you and/or your spouse’s **2016** tax return transcripts, and/or other documents as needed. If there are any differences, your FAFSA information will be corrected.

You and/or your spouse must complete this worksheet.

Complete this verification request as soon as possible to prevent delays in the receipt of your financial aid award.

### NOTICE ABOUT INCOME VERIFICATION

Income information for tax filers must be matched with the data on file with the Internal Revenue Service (IRS). See page 2 of this form.

As such, persons who have not filed 2016 taxes will not be able to complete the verification until they have filed and their tax information is available from the IRS.

Availability of information for online IRS Data Retrieval or IRS Tax Return Transcripts can take up to 2 weeks of filing taxes electronically and up to 8 weeks following paper tax filing.

### A. Student Information

_____	_____	_____	_____
Last Name	First Name	M.I.	MCNY ID#
_____			_____
Street Address (include Apt. no.)			Date of Birth
_____	_____	_____	_____
City	State	Zip Code	Phone Number (include area code)

### B. Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2018 through June 30, 2019, or if the child will be required to provide your information when completing a 2018-2019 FAFSA. Include children who meet either of these standards, even if they do not live with you.
- Other people if they now live with you and you provide more than half their support and will continue to provide more than half of their support through June 30, 2019.
- Provide college information for any household member who is, or 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, and include the name of the college. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Martin Jones (example)</i>	<i>28</i>	<i>Husband</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>	MCNY	

**Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.**

**Important Income Information for 2016 Tax Filers**

The **IRS Data Retrieval Tool** allows students and/or parents to access the 2016 IRS tax return information needed to complete the 2018-2019 Free Application for Federal Student Aid (FAFSA), and transfer the data directly into their FAFSA from the IRS Web site. If you are eligible to use the IRS Data Retrieval Tool, we highly recommend using the tool for several reasons:

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA has accurate tax information.
3. You won't need to provide a copy of your or your parents' tax returns to your college.

**Using the IRS Data Retrieval Tool on [www.FAFSA.gov](http://www.FAFSA.gov)**

- Go to [www.FAFSA.gov](http://www.FAFSA.gov), log in and select "Make FAFSA Corrections," and navigate to the student and/or spouse financial sections.
- If eligible to complete the process, use the IRS Data Retrieval to transfer 2016 IRS income tax information to the FAFSA.
- When using the IRS Data Retrieval, do not modify income data after transferring it to the FAFSA. If you allow the data to be transferred from the IRS Data Retrieval Tool to the FAFSA without modification, the transferred data will not be subject to verification. This will reduce the likelihood that your FAFSA will be selected for verification, potentially saving you time and hassle. If you modified any of the transferred data, an **IRS Tax Return Transcript** option will be required.

**How to Request a 2016 IRS TAX RETURN TRANSCRIPT:** If you and/or your spouse are unable or choose not to use the IRS Data Retrieval Tool, IRS Tax Return Transcript(s) will be required.

- Go to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) and get transcript online or by mail; make sure to request a *2016 Tax Return* Transcript(s) for you and/or your spouse.
- SSN, date of birth, and address used on the taxes are needed for each tax filer when making the request.
- Married persons filing separate tax returns must use Transcript option to request tax info for both student and/or spouse.
- IRS Tax Return Transcripts must be submitted with this verification worksheet.
- If you and/or your spouse filed amended return(s), submit the signed original tax return(s) or tax transcript(s) and signed 1040X(s).

**C. Student's (and Spouse's, if married) Income Information**

Have you (and spouse) filed a 2016 Federal Income Tax Return?

- YES...** Attach a copy of your (and spouse's) **2016 Federal Tax Return Transcript from the IRS** (*NOT a copy of 1040 Federal Tax Return filed*).
- YES...** I used the IRS Data Retrieval Tool on [www.FAFSA.gov](http://www.FAFSA.gov) to transfer my (spouse's) tax income information
- NO...** If you and/or spouse are not required or did not file a 2016 Federal Income 1040 Tax Return, you must complete the table below and attach copies of ALL 2016 W-2 forms and **Verification of 2016 Non-Tax Filing Letter** from [irs.gov](http://irs.gov).

Table C		
Employer's Name	2016 Amount Earned	IRS W-2 Attached (Yes or No?)
	\$	
	\$	
	\$	
	\$	

**Important Income Information for 2016 Non-Tax Filers**

All **NON-TAX FILERS** are required to provide an **IRS Verification of Non-Filing Letter** dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS. An IRS Verification of Non-filing Letter can be obtained online at <https://www.irs.gov/individuals/get-transcript> using the IRS Get Tax Transcript service. If you cannot request it online, it must be obtained from the IRS using **Form 4506-T**, Request for Transcript of Tax Return, and **checking box 7**.

Please note that Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.

**\*\*\*DO NOT list Metropolitan College of New York (MCNY) as a third party to receive the Tax Transcript.\*\*\*** It will be difficult for our mailroom and Financial Aid Office to match an incoming IRS Tax Return Transcript to the aid applicant (student), as the names may be different.

**D. Certification and Signatures**

By signing this worksheet, we certify that all information reported is complete and correct. If married, spouse's signature is optional

**WARNING: 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

**Submit this worksheet to the Financial Aid Office.**

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

**You should make a copy of this worksheet for your records.**

**E. High School Completion**

As per federal regulation, MCNY's Financial Aid Office must receive documentation of your high school diploma, recognized equivalent or home-school credential.

**Note:** The documentation must be submitted to the MCNY's Financial Aid Office, even if previously provided to another MCNY office/department (such as the Admission Office).

**Provide one of the following documents to indicate the student's high school completion status when the student begins college in 2018–2019:**

- \_\_\_ A copy of the student's high school diploma
- \_\_\_ 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 final official high school transcript that shows the date when the diploma was awarded.
- \_\_\_ A state certificate or transcript received by a student after the student passed a State authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- \_\_\_ 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 student who was homeschooled in a state where state law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- \_\_\_ For a student who was homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or 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.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

**F. Certification and Signatures**

By signing this worksheet, we certify that all information reported is complete and correct. If married, spouse's signature is optional

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\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

**Submit this worksheet to the Financial Aid Office.**

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

**You should make a copy of this worksheet for your records.**

**G. Identity/Statement of Educational Purpose**

**Identity/Statement of Educational Purpose (To Be Signed IN-PERSON at MCNY)**

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

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that  
(Print Student’s Name)

the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Metropolitan College of New York for 2018-2019.

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student’s ID Number

Staff Initials & Date \_\_\_\_\_

ID Reviewed & Copied:    Driver License    State ID    Passport    Other: \_\_\_\_\_

