

## 2018-2019 Dependent Verification Worksheet

Last Name	First Name	M.I.	Union ID or SSN
Address			Date of birth
City	State	Zip	(   ) Phone number

### PART 1. Household Information - Carefully follow instructions below

Please list:

1. **Yourself**
2. **Your parent(s)**. In cases of separation/divorce, list the parent with whom you lived more during the past 12 months. If this parent is remarried, you must include your stepparent.
3. **Your siblings/other dependent children** for the 2018-19 academic year.
4. **Other people** if they live with and will receive at least half of their support from your parent(s) during the entire period from July 1, 2018 to June 30, 2019.

Full Name	Age	Relationship to Student (see instructions above)	Name of College (Attending at least half-time during 2018-19)	Graduate Student Y/N
		Self	Union College	No

If you need more space, attach a separate page and check this box

### PART 2. Student 2016 Tax and Income Information - Did you file a 2016 tax return?

YES, I filed a return	<input type="checkbox"/> 1. I utilized, or will utilize, the FAFSA IRS Data Retrieval Tool. All W-2s are attached or have been previously submitted. <input type="checkbox"/> 2. The FAFSA IRS Data Retrieval Tool could not be utilized. My official IRS Tax Return Transcript and corresponding W-2(s) are attached or will be submitted by the April 16, 2018 deadline.
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**Note:** If you were required to file an amended return, you must submit the official IRS Tax **Account** Transcript (*not the Tax Return Transcript*), a signed copy of the 1040X and all W-2s by the April 16, 2018 deadline.

NO, I did not file a return	<input type="checkbox"/> 1. I was not employed and had no income from work during the 2016 tax year. <input type="checkbox"/> 2. I was employed and all W-2s are attached or have been previously submitted. Any employers who did not issue a W-2 are listed below.
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Employer's Name	2016 Amount Earned

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\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
M.I.

\_\_\_\_\_  
Union ID or SSN

## PART 3. Parent 2016 Tax and Income Information

**Part 3A to be completed by tax filers, Part 3B to be completed by non-filers**

### 3A. Tax Return Filers: Select Option 1 or 2

Important Notes:

- ▶ **If parents are married, but FILED SEPARATELY**, each parent needs to submit their official IRS Tax Return Transcript.
- ▶ **If parents filed an AMENDED return**, submit the official IRS Tax **Account** Transcript (*NOT the Tax Return Transcript*) and a signed copy of federal form 1040X.
- ▶ **If parents had a change in marital status after Dec 31, 2016**, submit the official IRS Tax Return Transcript.
- ▶ **If parents filed using Tax ID numbers**, submit the official IRS Tax Return Transcript.

<b>Option 1</b>	<p><b>FAFSA IRS Data Retrieval Tool (DRT) users, select one of the following:</b></p> <p><input type="checkbox"/> A. The DRT was utilized. All W-2s are attached or have been previously submitted.</p> <p><input type="checkbox"/> B. The DRT will be utilized by the April 16, 2018 deadline. All W-2s are attached or have been previously submitted.</p>
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<b>Option 2</b>	<p><b>Parent(s) submitting official IRS Tax Return Transcript(s)</b></p> <p><input type="checkbox"/> The transcript and all W-2s are attached or will be submitted by the April 16, 2018 deadline.</p>
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### 3B. Tax Return Non-Filers

**Parents who did not, and were not required to, file a tax return with the IRS must submit a Verification of Nonfiling.**

You can obtain the Verification of Nonfiling by completing IRS Form 4506-T located on the IRS website. Note: If neither parent filed, each parent must complete Form 4506-T. Once you receive the Verification of Nonfiling from the IRS, you must forward it to our office by the April 16, 2018 deadline. Additionally, please select one of the following options:

- All 2016 W-2s are attached or have been previously submitted. Note: Employers who did not issue a W-2 should be listed in Part 4.
- The parent(s) did not receive any W-2s or earn income from work in 2016

## PART 4. Untaxed Income

**When applicable, add any additional sources of untaxed income and corresponding dollar amount**

Sources of Untaxed Income	2016 Amount	Sources of Untaxed Income	2016 Amount
a. Child Support You Received		e. Health Savings Account (IRS Form 1040, line 25)	
b. Disability Payments		f. Tax-Deferred Pension (W-2 forms boxes 12a-12d, codes D, E, F, G, H & S)	
c. Workers' Compensation		g.	
d. Untaxed Pensions		h.	

## PART 5. Signatures

Each person signing this form certifies that all the information reported on it is complete and correct. Both the parent who completed the FAFSA and the student must sign and date below.

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent

\_\_\_\_\_  
Date