2013-2014 Verification Worksheet
Federal Student Aid Programs

What is Verification?
Your application was selected by the U.S. Department of Education for review in a process called “Verification”. The Financial Aid Office must compare your FAFSA with the information you provide on this worksheet and other financial documents. If there are differences between your application information and the documents you submit, your application may need to be corrected. The Financial Aid Office cannot make any federal financial aid payments available to you or process a student loan request until all verification requirements have been met and the necessary corrections have been made.

What Are the Steps?
1. Complete the IRS Data Retrieval through FAFSA on the Web. (It takes up to two weeks for the IRS income information to be available for the IRS Data Retrieval Tool for electronic tax return filers, and up to eight weeks for paper tax return filers. Visit our website at www.thomasaquinas.edu/admission/irs-data-retrieval-tool for more information.)
2. If you cannot complete Step 1, you may order a TAX RETURN TRANSCRIPT from the Internal Revenue Service online at www.irs.gov or by phone at 1-800-908-9946. Obtain a 2012 Federal IRS Tax Return Transcript and W-2 forms for yourself and your parents/step-parent.
3. Fill in and sign this worksheet—you and at least one parent must sign.
4. Review your Student Aid Report (SAR), Missing Information letters from the Financial Aid Office and the second page of this worksheet to see if you need to submit other documentation (such as Tax Returns, the Confidential Family Financial Statement, proof of receipt of food stamps, etc.).
5. After a financial aid representative reviews your information, you could be asked to submit additional documentation. When all information has been reviewed and any necessary corrections made, you will be notified about your financial aid awards and payments.

A. STUDENT AND FAMILY INFORMATION

<table>
<thead>
<tr>
<th>Student’s Last Name</th>
<th>Student’s First Name</th>
<th>Student’s M.I.</th>
<th>Student’s Social Security Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student’s Street Address (include apt. no.)</td>
<td>Student’s Date of Birth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State</td>
<td>Zip Code</td>
<td>Student’s Email Address</td>
</tr>
<tr>
<td>Student’s Home Phone Number (include area code)</td>
<td>Student’s Alternate or Cell Phone Number</td>
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List below the people in your parents’ household. Include:
- Yourself and your parents (including a stepparent) even if you don’t live with your parents.
- Your parents’ other children if your parent(s) will provide more than half of their support from July 1, 2013, through June 30, 2014, or if the other children would be required to provide parental information if they were completing a FAFSA for 2013–2014. Include children who meet either of these standards, even if they do not live with your parent(s).
- Your parent(s)’ unborn child if that child will be born before July 1, 2014 and your parents will provide more than half of the child’s support from the projected date of birth through the end of the 2013-2014 award year (June 30, 2014). (If there is a medical determination of a multiple birth, then all expected children can be included.)
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support between July 1, 2013 and Jun 30, 2014.

Write the names of all family members including yourself. Also write the name of the college for any family member who will be attending college at least half-time between July 1, 2013 and June 30, 2014 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page with the student’s name at the top.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missy Jones (example)</td>
<td>18</td>
<td>Sister</td>
<td>Central University</td>
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<td>Self</td>
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ADDITIONAL INFORMATION AND SIGNATURE REQUIRED ON NEXT PAGE
B. STUDENT'S INCOME INFORMATION
Check only ONE of the three boxes below and provide the requested information and documents for that item:

- I have used (or will use) the IRS Data Retrieval Tool (after my 2012 taxes are completed and processed by the IRS) to transfer my 2012 income information to the FASFA and have made (or will make) no further changes to the information.

- I did not (or could not) transfer my 2012 income information to the FAFSA using the IRS Data Retrieval. I have attached a copy of my 2012 IRS Tax Return Transcript. (Only use if the IRS Data Retrieval failed to load completed and processed taxes.)

- I was not required to file a 2012 Federal Income Tax Return. (If you’ve checked this box, please list sources and amounts of any earned income received in 2012 and attach any corresponding W-2s.)

Complete this table only if you checked the third box above.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>2012 Amount Earned</th>
<th>Has an IRS W-2 been received?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Company (example)</td>
<td>$2,132.47 (example)</td>
<td>Yes (example)</td>
</tr>
</tbody>
</table>

C. PARENTS' INCOME INFORMATION
Check only ONE of the three boxes below and provide the requested information and documents for that item:

- I have used (or will use) the IRS Data Retrieval Tool (after my 2012 taxes are completed and processed by the IRS) to transfer my 2012 income information to the FAFSA and have made (or will make) no further changes to the information.

- I did not (or could not) transfer my 2012 income information to the FAFSA using the IRS Data Retrieval. I have attached a copy of my 2012 IRS Tax Return Transcript. (Only use if the IRS Data Retrieval failed to load completed and processed taxes).

- I was not required to file a 2012 Federal Income Tax Return. (If you’ve checked this box, please list sources and amounts of any earned income received in 2012 and attach any corresponding W-2s.)

Complete this table only if you checked the third box above.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
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<tr>
<td>ABC Company (example)</td>
<td>$2,132.47 (example)</td>
<td>Yes (example)</td>
</tr>
</tbody>
</table>

D. PARENTS’ BENEFITS INFORMATION
Check the appropriate boxes below and provide the requested information and documents. (More than one box may be checked):

- In 2011 or 2012, a member of the parents’ household (as defined in Section A of this form) received food stamps (SNAP) benefits. (You may be asked to provide documentation.)

- One of the parents included in the household defined in Section A of this form, or the student, paid child support in 2012. Complete the following table (use an additional sheet if necessary):

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E. CERTIFICATION
I certify that all the information reported to qualify for Federal student aid is complete and correct.

Student’s Signature ________________________________ Date ________________________________

Parent’s Signature ________________________________ Date ________________________________

Submit this worksheet to the financial aid office at:
THOMAS AQUINAS COLLEGE
FINANCIAL AID OFFICE
10,000 OJAI ROAD
SANTA PAULA, CA 93060

Fax: (805) 525-9342
E-mail: FinAid@ThomasAquinas.edu
Phone: (800) 634-9797, extension 5936

You should make a copy of this worksheet for your records.
Each year the Department of Education selects approximately one-third of all FAFSAs for “verification” which means the student and his parents are required to complete a supplemental worksheet and provide confirmation of the federal income tax information requested on the FAFSA.

In order for Thomas Aquinas College to verify your FAFSA (and consequently your eligibility for federal student aid), you and your parents must complete a Verification Worksheet (available on the College’s website) and confirm your federal income tax data through one of two means:

**Method #1:** Import the tax information into the FAFSA using the IRS Data Retrieval Tool, or

**Method #2:** Request a “Tax Return Transcript” from the IRS and forward it to the school.

Both of these methods are very easy to do. Here are some helpful tips:

**Using the IRS Data Retrieval Tool available at www.fafsa.ed.gov** *(FAST AND EASY)*

A picture is worth a thousand words, but a video is worth even more. There is an excellent, three-minute video at [http://tinyurl.com/FinAid-1](http://tinyurl.com/FinAid-1) that will show you exactly how to use the IRS Data Retrieval Tool to import student tax data and parent tax data into the FAFSA. You will know just what to do after watching this video.

**Ordering a Tax Return Transcript** *(NOT AS FAST, BUT VERY EASY)*

For those who prefer a low-tech solution, there is the “Tax Return Transcript.” The Tax Return Transcript is not the same as a photocopy of your tax return. It is a report issued by the IRS that shows the tax data they have on file for your tax return. The Tax Return Transcript can be ordered in two ways:

(a) Go to [www.IRS.gov](http://www.IRS.gov) and click on the link that says “Order a Return or Account Transcript.” Be prepared to enter the Social Security number of the primary tax filer, date of birth of the primary tax filer, street address and ZIP Code. On the next screen select “Return Transcript” and “2012” for the tax year. That’s it. If the transcript is available, it will be sent to you in 5 to 10 days. When you receive it, forward it to the Financial Aid Office. Be sure to order both the parents’ and the student’s Tax Return Transcript.

(b) If you prefer, you can place your order through the IRS’ automated phone line. Call 1-800-908-9946. Make sure to request the “Tax Return Transcript” and not the “Tax Account Transcript.” You will need the tax filer’s Social Security Number and the tax filer’s address on file with the IRS.

After you receive the Tax Return Transcript(s) in the mail, forward them to the Financial Aid Office at Thomas Aquinas College.

**Other Helpful Information**

It takes up to two weeks for income information to be available for the IRS Data Retrieval Tool or the Tax Return Transcript for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. The Financial Aid Office still requires a signed, paper copy of your tax return as part of the regular financial aid application, for the paper copy contains information not available through the IRS Data Retrieval Tool or the Tax Return Transcript.

If you have *amended* your tax return, you will not be able to use the IRS Data Retrieval Tool or the Tax Return Transcript to complete the verification process. Instead, you will be asked to provide the Financial Aid Office with a signed copy of your original tax return and a signed copy of IRS Form 1040X (“Amended U.S. Individual Income Tax Return”) with all amended forms and schedules. With the original and amended tax returns, the Financial Aid Office will be able to complete the verification of your FAFSA.

If you need more information, call the Financial Aid Office at (805) 421-5936. We will be happy to help you!