

ARCADIA UNIVERSITY

2019-2020 Federal Verification Worksheet

A. Student Information (please print)

Last Name	First Name	MI	Social Security Number*	Date of Birth
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*Social Security Number Policy: You are required to provide your Social Security number (SSN) on the FAFSA. Provision of your SSN is required on this and all supporting documents used to apply for financial aid. Your SSN will be used for the University's system of student records and for compliance with federal and state reporting requirements, as well as for debt collection. The University will not disclose your SSN to anyone outside the institution except as required by law and will make every effort to protect your privacy.

Student and Parent Information must be completed if the student answers "no" to all of the following questions. Graduate/professional students should complete student/spouse sections only.

- Were you, the student, born before January 1, 1996? Yes No
- As of today, are you, the student, married? (Answer "Yes" if you are separated but not divorced.) Yes No
- Do you, the student, have dependents other than your children/spouse who live with you and receive more than half of their financial support from you? Yes No
- Are you, the student, a veteran of the U.S. Armed Forces? Yes No
- Are you a graduate or professional student? Yes No
- Are you or were you an emancipated minor as determined by a court in your state of legal residence? Yes No
- At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court? Yes No
- As determined by a court in your state of legal residence, are you or were you in legal guardianship of someone other than a parent? Yes No
- At any time on or after July 1, 2018 did the director of a runaway or homeless youth center determine you were an unaccompanied youth who was homeless or at risk for homelessness? Yes No

B. Household Information (List the Arcadia student applying for aid, his/her parent(s), siblings, and other household members.)

Include only those individuals for whom your parents (if you are a dependent student) or you (if you are an independent student) are financially responsible for the 2019-20 school year. Financially responsible is defined as paying for 51 percent or more of the individual's living expenses. If necessary, use additional paper for household members.

Full Name	Age	Relationship	College
(Example) Jane Doe	18	Sister	Arcadia University

C. Federal Tax Returns and Income Information

Check only one box in each applicable section below. All applicants must complete the Student Information section. If you opted not to select the IRS Data Retrieval Tool when filing the FAFSA or were not eligible to utilize this option, you must request an IRS Tax Return Transcript and submit this to the Financial Aid Office, unless you were selected for federal verification last year while enrolled at Arcadia and already provided us with your 2017 federal tax transcript(s). You can request this document as follows: via the IRS *Get Transcript* site, [irs.gov/transcript](https://www.irs.gov/transcript). Once you receive your tax transcript, you can email it to finaid@arcadia.edu with the student's name noted in the subject line of the email, or mail it to the Financial Aid Office with your student's name clearly notated on it. The Financial Aid Office **cannot** accept copies of your filed 2017 Federal Tax Returns. If the IRS Data Retrieval Tool is not selected on the FAFSA, a 2017 IRS Tax Return Transcript must be obtained directly from the IRS for tax filers.

1. Student

- I used the IRS Data Retrieval Tool when filing my 2019-20 FAFSA and the information transferred successfully.
- I did not use the IRS Data Retrieval Tool at fafsa.gov when filing my FAFSA or was unsuccessful in getting the information to transfer when I tried, but have requested a 2017 IRS Tax Return Transcript from the IRS, which is attached.
- Check here if you will not file and are not required to file a 2017 U.S. Federal Income Tax Return. Go to arcadia.edu/finaidforms2019 and complete the 2019-20 Student Non-Tax Filer Form.
- Check here if you already have submitted a 2017 IRS Tax Return Transcript to Arcadia University either this year.

2. Parent(s) (of student)

- I used the IRS Data Retrieval Tool when filing my 2019-20 FAFSA and the information transferred successfully.
- I did not use the IRS Data Retrieval Tool at fafsa.gov when filing my FAFSA or was unsuccessful in getting the information to transfer when I tried, but have requested a 2017 IRS Tax Return Transcript from the IRS, which is attached.

- Check here if you will not file and are not required to file a 2017 U.S. Federal Income Tax Return. You must request an IRS Verification of Non-Filing Statement at www.irs.gov. Under Tools, click "Get Transcript Online". Enter the non-filers SSNO, choose "Verification of Non-Filing Letter", and in the tax year field, select "2017". You may also request one by phone at 1-800-908-9946. Go to arcadia.edu/finaidforms2019 and complete a 2019-20 Parent Non-Tax Filer Form.
- Check here if you already have submitted a 2017 IRS Tax Return Transcript to Arcadia University, either this year.

3. Spouse (of student)

- I used the IRS Data Retrieval Tool when filing my 2019-20 FAFSA.
- I did not use the IRS Data Retrieval Tool at fafsa.gov when filing my FAFSA but have requested a 2017 IRS Tax Return Transcript from the IRS, which is attached.
- Check here if your spouse will not file and is not required to file a 2017 U.S. Federal Income Tax Return.
- Check here if your spouse already has submitted a 2017 IRS Tax Return Transcript this year.

D. Additional Financial Information

Student/Spouse		Parent(s)
\$ Annual Amount	a. Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 33.	\$ Annual Amount
\$ Annual Amount	c. Taxable earnings from need-based employment programs, such as Federal Work Study and need-based employment portions of fellowships and assistantships.	\$ Annual Amount
\$ Annual Amount	d. Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$ Annual Amount
\$ Annual Amount	e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.	\$ Annual Amount
\$ Annual Amount	f. Earnings from work under a cooperative education program offered by a college.	\$ Annual Amount
\$	< Total	Total > \$

Student/Spouse		Parent(s)
\$ Annual Amount	a. Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in boxes 12a thru 12d, codes D, E, F, G, H, and S. Submit your 2017 W-2.	\$ Annual Amount
\$ Annual Amount	b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040-line 28 + line 32 or 1040A-line 17.	\$ Annual Amount
\$ Annual Amount	c. Child support received for all children, include statement of benefits from 2017.	\$ Annual Amount
\$ Annual Amount	d. Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.	\$ Annual Amount
\$ Annual Amount	e. Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$ Annual Amount
\$ Annual Amount	f. Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$ Annual Amount
\$ Annual Amount	g. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$ Annual Amount
\$ Annual Amount	h. Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work Study allowances.	\$ Annual Amount
\$ Annual Amount	i. Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if your parents are not tax filers), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.	\$ Annual Amount
\$	< Total	Total > \$

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Arcadia University for 2019-20.

(Print Student's Name)

Student/Parent/Spouse Signature(s) (At least one parent/spouse of dependent student must sign form.)

By signing this worksheet, I/we certify that all the information reported herein is complete and correct. I recognize that if I purposely give false or misleading information on this worksheet, I may be fined, be sentenced to jail, or both.

Student Signature

Date

Parent/Spouse Signature

Date