



Dependent Student 2018-2019 Verification Worksheet Federal Student Aid Programs

Montana Tech-Financial Aid
1300 W Park St
Butte, MT 59701
Phone: 406-496-4223
Fax: 406-496-4705

Write your full name and student ID number on the top of both pages of this form.

Last Name	First Name	Student ID Number or Date of Birth
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Step 1 – Household Information & Number in College

In the space below write the full name, age, and relationship to the student of all the people in your household including:

- List the student**

Full Name	Age	College
		Montana Tech

- List the parent(s) reported on the 1819 FAFSA, including stepparent if applicable**

Parent 1 Living in the household – Name	Age	Parent 2 Living in the household – Name	Age

- List the parent(s)' other children** if the parent(s) will provide more than half of the children's support from July 1, 2018 through June 30, 2019 or if the other children would be required to provide parental information if they were completing a FAFSA for 2018-2019. Include children who meet either of these standards even if a child does not live with the parent(s).
- List other people** if they now live with the parent(s) and the parent(s) provide more than half of the other person's support and will continue to provide more than half of that person's support between July 1, 2018 and June 30, 2019.

Names of Household Members: Siblings and others supported by parents (See Above)	Age	Relationship to Student	Will he/she be enrolled in a degree program at a college/university at least half-time between July 1, 2018 & June 30, 2019	Name of College or University
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

Check here if you have additional family members and you are attaching a separate sheet. (Include the student's name & ID number on any paperwork submitted to our office.)

Step 2 – Verification of 2016 Income Information for Student Tax Filer *(*If the student will not file and is not required to file a 2016 income tax return with the IRS skip Step 2 and continue to Step 3.)*

Check only one box below: (Please note, an IRS Tax Return Transcript is different than a copy of your tax return.)

- The student has used the Data Retrieval Tool through FAFSA. Date used: _____
- The student is attaching a 2016 IRS Tax Return Transcript or has requested it from the IRS. Date requested: _____
- The student has not yet filed a 2016 federal tax return and will be filing at a later date. By checking this box, I, the student, understand that I will still need to provide my 2016 federal tax & income information by using one of the methods above.

Step 3 – Verification of 2016 Income Information for Student Nontax Filer *(*If the student filed or will file a 2016 income tax return with the IRS skip Step 3 and continue to Step 4.)*

Important Note—By checking the appropriate box below and signing this document the student is certifying that he or she has not filed and is not required to file a 2016 Federal Income Tax Return.

Check only one box below (Continued on page 2):

- The student was not employed and did not earn income in 2016.
- The student earned income from work in 2016, but will not file and is not required to file a 2016 Federal Income Tax Return. On **page two** of this worksheet, in the space provided, write the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form.
***Provide copies of all 2016 IRS W-2 forms issued to the student by their employers.**

Student's Name:

ID#:

(Step 3 Continued) Student Nontax Filer Only

Sources/Employer's Name	2016 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (example)
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Check here if you need additional space and are attaching a separate page that includes the student's name & ID number.

Step 4 – Verification of 2016 Income Information for Parent Tax Filers (*If the parent(s) will not file and are not required to file a 2016 income tax return with the IRS skip Step 4 and continue to Step 5.)

Important Note—Parent's Income Information to be verified: If two parents were reported on Step 1 of this worksheet, the instructions and certifications below refer and apply to both parents. Notify the financial aid office if the parents filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Check only one box below: (Please note, an IRS Tax Return Transcript is different than a copy of your tax return.)

- The parent(s) have used the Data Retrieval Tool through FAFSA. Date used: _____
- The parent(s) are attaching a 2016 IRS Tax Return Transcript or have requested it from the IRS. Date requested: _____
- The parent(s) have not yet filed a 2016 federal tax return and will be filing at a later date. By checking this box, I, the parent, understand that I will still need to provide my 2016 federal tax & income information by using one of the methods above.

Step 5 – Verification of 2016 Income Information for Parent Nontax Filers (*If the parent(s) filed or will file a 2016 income tax return with the IRS skip Step 5 and continue to the signature certification.)

Important Note—Parent's Income Information to be verified: If two parents were reported on Step 1 of this worksheet, the instructions and certifications below refer and apply to both parents. Notify the financial aid office if the parents filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Part 1. Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2016 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority. Confirmation of non-filing can be obtained from the IRS. Please refer to instructions on requesting IRS confirmation of non-filing status.

- Check here if IRS confirmation of non-filing is provided.
- Check here if IRS confirmation of non-filing will be provided later. Date requested: _____

Part 2. Check only one box below:

- The parent(s) was not employed and did not earn income in 2016.
- The parent(s) earned income from work in 2016, but will not file and is not required to file a 2016 Federal Income Tax Return. List below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form. ***Provide copies of all 2016 IRS W-2 forms issued to the parent(s) by their employers.**

Sources/Employer's Name	2016 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (example)
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Check here if you need additional space and are attaching a separate page that includes the student's name & ID number.

Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and the parent must sign and date. (Please print the form to provide a signature.)

Student's Signature (Required) Date

Parent's Signature (Required) Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

*Please submit this worksheet to
Montana Tech, Attn: Financial Aid
1300 W Park St, Butte, MT 59701
or fax to 406-496-4705*

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