



# Independent Student 2017-2018 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 I.D. Number

## 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 student's spouse, if the student is married

Name of Spouse (If you are married list your spouse here, otherwise leave blank.)	Age	Relationship to Student	Will he/she be enrolled in a degree program at a college/university at least half-time between July 1, 2017 & June 30, 2018	Name of College or University
		Spouse	<input type="checkbox"/> Yes <input type="checkbox"/> No	

- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2017 through June 30, 2018, even if a child does not live with the student.
- Other people, if they now live with the student and the student or spouse provides more than half of that person's support from July 1, 2017 through June 30, 2018.

Names of Household Members: children and others supported by student (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, 2017 & June 30, 2018	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 2015 Income Information for Student Tax Filers (\*If the student will not file and is not required to file a 2015 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 filed a 2015 Federal Tax Return electronically and is attaching a signed copy or is attaching a 2015 IRS Tax Return Transcript or used the IRS Data Retrieval Tool through FAFSA prior to March 10<sup>th</sup> 2017.
- The student filed 2015 a Federal Tax Return by mail and is attaching a 2015 IRS Tax Return Transcript or has requested it from the IRS. Date requested: \_\_\_\_\_
- The student has not yet filed a 2015 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 2015 federal tax & income information by using one of the methods above.

## Step 3 – Verification of 2015 Income Information for Student Nontax Filers (\*If the student filed or will file a 2015 IRS income tax return 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 2015 Federal Tax Return.**

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

- The student was not employed and did not earn income in 2015
- The student earned income from work in 2015 but will not file and is not required to file a 2015 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 2015, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form.

**\*Copies of all 2015 IRS W-2 forms issued to the student by their employers are required.**

(Part 2. Continued) Student Nontax Filers Only

Sources/Employer's Name	2015 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

\*If you need additional space please attach a separate page that include the student's name & ID number.

**Step 4 – Verification of 2015 Income Information for the Student's Spouse Tax Filer** (\*If the student's spouse will not file and is not required to file a 2015 income tax return with the IRS skip Step 4 and continue to Step 5. \*If no spouse is listed on Step 1 of this worksheet skip to the signature certification.)

**Important Note** — Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2015 or had a change in marital status after December 31, 2015.

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

- The student's spouse filed a 2015 Federal Tax Return electronically and is attaching a signed copy or is attaching a 2015 IRS Tax Return Transcript or used the IRS Data Retrieval Tool through FAFSA prior to March 10<sup>th</sup> 2017.
- The student's spouse filed a 2015 Federal Tax Return by mail and is attaching a 2015 IRS Tax Return Transcript or has requested it from the IRS. Date requested: \_\_\_\_\_
- The student's spouse has not yet filed a 2015 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/and or my spouse's 2015 federal tax & income information by using one of the methods above.

**Step 5 – Verification of 2015 Income Information for Student's Spouse Nontax Filer** (\*If the student's spouse filed or will file a 2015 IRS income tax return skip Step 5 and continue to the signature certification.)

**Important Note** — Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2015 or had a change in marital status after December 31, 2015.

**Important Note**—By checking the appropriate box below and signing this document the student is certifying that his or her spouse has not filed and is not required to file a 2015 Federal Tax Return.

**Check only one box below:**

- The student's spouse was not employed and did not earn income in 2015
- The student's spouse earned income from work in 2015 but will not file and is not required to file a 2015 Federal Income Tax Return. List below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form. **\*Copies of all 2015 IRS W-2 forms issued to the student's spouse by their employers are required.**

Sources/Employer's Name	2015 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

\_\_\_\_\_  
Spouse's Signature (Optional) 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 or fax to  
406-496-4705

You should make a copy of this worksheet for your records