



**I-V5 Aggregate**

**2019-2020 Verification Worksheet for Independent Students**

As per federal regulation, IU must confirm the information you reported on your 2019-2020 Free Application for Federal Student Aid (FAFSA). To verify that you provided correct information we will compare our FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit them to Immaculata's Financial Aid office. Please note that we may ask for additional information. If you have questions about verification, contact our office as soon as possible so that your financial aid processing will not be delayed.

**Submit this worksheet to:** Immaculata University, Office of Financial Aid, 1145 King Road, Lillian P. Lettiere Center 219, Immaculata, PA 19345; Email: [Finaid@immaculata.edu](mailto:Finaid@immaculata.edu) Fax: 484 395 0068.

**A. Independent Student's Information (please print)**

\_\_\_\_\_  
 Student's Last Name      First Name      Middle Initial      Last 4 Digits of student Social Security #

\_\_\_\_\_  
 Student's Street Address (include apt. #)      Student Date of Birth

\_\_\_\_\_  
 City      State      Zip Code      Student Email Address

\_\_\_\_\_  
 Student Home or Cell Phone Number with Area Code      Student Immaculata ID Number

**B. Independent Student's Family Information**

List below the people in your household. Include:

- Yourself
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2019 through June 30, 2020, or if the child would be required to provide your information if they were completing a FAFSA for 2019-2020. Include children who meet these standards, even if they do not live with you.
- Include the name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2019 and June 30, 2020. If more space is needed, attach a separate page with your name and Social Security # at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time

**C. Independent Student's Income Information to be verified – Check the Box that applies:**

- I, the student will not file and am not required to file a 2017 income tax return with the IRS.  
**IMPORTANT NOTE:** The student must **also complete** and return a 2019-2020 Student Non-Filer Form **AND** obtain an IRS Verification of Non-filing Letter by going to [www.irs.gov](http://www.irs.gov).
- I, the student, have used the IRS Data Retrieval Tool in FAFSA on the web to retrieve and transfer 2017 IRS income information into the FAFSA, either on the initial FAFSA or when making corrections to the FAFSA. The student's school will use the IRS information that was transferred in the verification process.
- I, the student, have not used the IRS Data Retrieval Tool in FAFSA on the web, but will use the tool to retrieve and transfer 2017 IRS income information onto the FAFSA. (See instructions below).
- I, the student am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the web and I will submit to the school a copy of my **2017 IRS Tax Return Transcript**. To obtain a free IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and order a "Tax Return Transcript" or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript". You will need your Social Security Number, date of birth, and the address on file with the IRS. Adequate time from the date of filing your tax return (up to two weeks for IRS electronic filers, and up to eight weeks for paper IRS filers) is necessary prior to requesting an IRS tax return transcript. The IRS estimates allowing a minimum of 5 business days for your receipt of an available requested transcript.
  - Check here if the student's IRS tax return transcript is attached to this worksheet
  - Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

**TAX RETURN FILERS and NON FILERS– Important Note: Copies of all W-2's are required.**

**INSTRUCTIONS:** Go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov), log into the student's FAFSA record and select "Make FAFSA Corrections" and navigate to the Financial Information section of the form. From there, follow the instructions to use the IRS Data Retrieval Tool to transfer 2017 IRS income tax information into the student's FAFSA.

Student's Name: \_\_\_\_\_ Last 4 Digits of Student's SSN: \_\_\_\_\_ page 3 of 4

#### D. High School Completion Verification

As per federal regulation, Immaculata's financial aid office must receive documentation of your high school diploma, recognized equivalent or home-school credential. **NOTE: The documentation must be submitted to the Immaculata Office of Financial Aid, even if previously provided to another Immaculata office (such as an Admission Office).**

**Check the one blank applicable to the documentation you will be submitting with this completed worksheet:**

*Copy of the student's high school diploma:*

\_\_\_\_ Copy of student's high school diploma or final high school transcript showing the date the applicant completed secondary school.

*OR*

*Copy of one of the recognized equivalents of student's high school diploma:*

\_\_\_\_ General Education Development Certificate

\_\_\_\_ Certificate recognized by the state as an equivalent to a Diploma

\_\_\_\_ Academic transcript showing successful completion of at least a two-year program fully acceptable toward a Bachelor's Degree

\_\_\_\_ Documentation that the student excelled in high school if the student did not complete high school, acceptable only if the student is enrolling in at least an Associate's Degree Program

*OR*

*Copy of one form of home-school documentation:*

\_\_\_\_ Transcript signed by student's parent or guardian documenting the successful completion of secondary education and listing the courses completed by the student

\_\_\_\_ State-issued home-school certification credential

#### E. Identity Verification and Statement of Educational Purpose

As per federal regulation, Immaculata must receive documentation of your identity AND a signed Statement of Educational purpose for the 2019-2020 award year.

**Submit a copy of government-issued photo identification** (such as a driver's license, passport, or military ID); **AND**

**Submit a Statement of Educational Purpose** signed by the student for the 2019-2020 award year.

Student's Name: \_\_\_\_\_ Last 4 Digits of Student's SSN: \_\_\_\_\_ page 4 of 4

**Attach a copy of your government-issued photo identification**

**NOTE: If you come to the Immaculata University Office of Financial Aid IN PERSON to show your original government-issued ID for us to copy AND while IN PERSON at our office, sign the Certification and Signature section below, then this worksheet DOES NOT need to be notarized. OTHERWISE, if you are unable to provide the aforementioned documentation IN PERSON, then the Certification and Signature section below MUST be notarized.**

**Statement of Educational Purpose for the 2019-2020 Award Year**

If you are the student, by signing the certification below, you certify that you (1) will use federal and/or state financial aid to pay the cost of attending an institution of higher education, (2) are not in default on a federal student loan or have made satisfactory arrangements to repay it, (3) do not owe money back on a federal student grant or have make satisfactory arrangements to repay it, (4) will notify Immaculata if you default on a federal student loan and (5) will not receive a Federal Pell Grant from more than one college for the same period of time. If you are the parent or the student, by signing the certification below, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide information that will verify the accuracy of your completed worksheet. This information may include U.S. or state income tax forms that you filed or are required to file. Also, you certify that you understand that **the Secretary of Education has the authority to verify information reported on your FAFSA with the Internal Revenue Service and other federal agencies.** If you sign any document related to the federal student aid programs electronically using a Federal Student Aid ID (FSA ID), you certify that you are the person identified by the FSA ID and have not disclosed that ID to anyone else. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

**F. Certification and Signature**

Each person signing this worksheet certifies that all of the information reported on this worksheet is complete and correct. The student must sign and date.

\_\_\_\_\_  
**Student's Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Spouse's Signature (optional)**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Notary's Signature**

\_\_\_\_\_  
**Date**

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**Notary Name (please print)**

\_\_\_\_\_  
**Notary Commission Ends**

\_\_\_\_\_  
**Immaculata F/Aid Staff Member Signature & Date (only if witnessing in-person signatures of student & Parent)**

\_\_\_\_\_  
**Immaculata F/Aid Staff Member Name & Title (if signed above, must also copy original ID's)**