



Student Last Name

Student First Name

MI

CSUCI ID Number

Student Phone Number

Your 2017-2018 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the Financial Aid & Scholarships office. We may also ask for additional information upon further review. If you have special circumstances or require further instructions, please contact our office at (805) 437-8530 or [financial.aid@csuci.edu](mailto:financial.aid@csuci.edu).

**DO NOT SUBMIT THIS FORM UNLESS IT WAS REQUESTED FROM OUR OFFICE.**

### A. Household Information

1. Complete the following information about yourself:

First and Last Name	Age	Relationship to Student	Name of College student will attend in 2017-18*
		Self	CSU Channel Islands

2. Fill out the name and age of any parent (including a step-parent) who you listed on your FAFSA. Do not include a parent who is not living in the household due to separation, divorce, or death.

First and Last Name	Age	Relationship to Student
		Parent
		Parent

3. Do you have any siblings who either: a) your parents will provide more than half of their support from July 1, 2017 through June 30, 2018 OR b) have completed a 2017-18 FAFSA and included your parents information?

☐ Yes ☐ No If yes, complete the following information:

First and Last Name	Age	Relationship to Student	Name of College student will attend in 2017-18*
		Sibling	
		Sibling	
		Sibling	

4. Are there any other people who live with your parents and your parents will provide more than half of their support from July 1, 2017 through June 30, 2018? (For example: your children, your unborn child and/or your parent's unborn child, if that child will be born before June 30, 2018)

☐ Yes ☐ No If yes, complete the following information:

First and Last Name	Age	Relationship to Student	Name of College student will attend in 2017-18*

\* 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, 2017 and June 30, 2018. If more space is needed, attach a separate page with student's name and CI ID# at the top.

### 2015 Tax Filing Requirements for Most Taxpayers\*

If your filing status is...	AND at the end of 2015 you were...	THEN file a return if your gross income was at least...
Single	under 65 65 or older	\$10,300 \$11,850
Married filing jointly	under 65 (both spouses) 65 or older (one spouse) 65 or older (both spouses)	\$20,600 \$21,850 \$23,100
Married filing separately	any age	\$4,000
Head of household	under 65 65 or older	\$13,250 \$14,800

### Acceptable Documentation for Income Information

The best way to verify income is by utilizing the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA on the Web at [www.fafsa.gov](http://www.fafsa.gov). It can take up to 3 weeks after electronically filing your tax return before you can utilize the IRS DRT.

If you are unable or choose not to use the IRS DRT, then you are required to submit your "2015 IRS Tax Return Transcript" to the Financial Aid & Scholarships Office as part of the verification process.

\*IRS - Publication 17: If your parents (or someone else) claimed you as a dependent on their 2015 tax return and at the end of 2015 you were under the age of 65, you must file a tax return if your EARNED income was at least \$6,300. IRS Regulations also require that you must file a return if Self-Employment (e.g. Business) income is \$400 or more. This is only an overview of the IRS requirements found in 2015 IRS Publication 17, we encourage you to consult with a tax preparer or visit [www.irs.gov](http://www.irs.gov) for more information.

## B. Student's Income Information

Did, or will, you, the student, file a 2015 income tax return with the IRS?

☐ Yes (select one option from column below)

☐ No (select one option from column below)

### Student Tax Filers

- ☐ I have used the IRS Data Retrieval Tool (IRS DRT) to retrieve and transfer my 2015 IRS income information into my FAFSA.
- ☐ I am unable or choose not to use the IRS DRT. I am submitting my 2015 IRS Tax Return Transcript with this worksheet instead.
- ☐ I will file but have not yet completed my return because I have been approved for a Tax Extension by the IRS. *You must submit a copy of IRS Form 4868 and all 2015 W-2's and/or equivalent document; if you are self-employed, you will also need to submit a signed and typed statement with the amount of your Adjusted Gross Income (AGI) and estimated U.S. income taxes paid, please use the "Financial Aid Statement Form".*

### Student Nontax Filers

- ☐ I was not employed and had no income earned from work in 2015.
- ☐ I was employed in 2015 and have listed below the names of the employer(s) and the amount earned from each employer in 2015. Please provide copies of all 2015 IRS W-2 forms issued by your employer(s). List every employer even if the employer did not issue an IRS W-2 form. *If you are unable to provide a W-2 form, you must indicate a reason why you are unable to provide your wage statements.*

Employer's Name	2015 Amount Earned	IRS W-2 Provided? If no, state reason
Example: Suzy's Auto Body Shop	Example: \$2,000.00	Example: Yes

## Parent's Tax Filing Status

Note: If two parents were reported in Section A of this worksheet, the instructions and certifications below refer to and apply to both parents. Check the appropriate box for your parents: *(for informational purposes only)*

- ☐ FAFSA marital status is "Married" and my parents' tax filing status was "Married Filing Jointly." You must use the IRS Data Retrieval Tool available on the FAFSA **OR** you must attach a copy of your parents' 2015 IRS Tax Return Transcript.
- ☐ Tax filing status was "Married Filing Jointly;" however, my parents have since Separated, Divorced, or have been Widowed. You must attach a copy of your parents' 2015 IRS Tax Return Transcript **AND** copies of all their 2015 W-2s.

- ☐ FAFSA marital status is "Married" and my parents' tax filing status was "Married Filing Separately." You must attach a copy of **BOTH** your parents' 2015 IRS Tax Return Transcript.
- ☐ FAFSA marital status is "Unmarried, both parents living together." You must attach a copy of **BOTH** parents' 2015 IRS Tax Return Transcripts.
- ☐ None of these options apply.

## C. Parent's Income Information

Did, or will, your parent(s), file a 2015 income tax return with the IRS?

☐ Yes (select one option from column below)

☐ No (select one option from column below)

### Parent Tax Filers

- ☐ My parents have used the IRS DRT to retrieve and transfer their 2015 IRS income information into the FAFSA.
- ☐ My parents are unable and choose not to use the IRS DRT. My parents are submitting their 2015 IRS Tax Return Transcript with this worksheet instead.
- ☐ My parents will file, but have not yet completed their return because they have been approved for a Tax Extension by the IRS. *Your parent(s) must submit a copy of IRS Form 4868 and all 2015 W-2's and/or equivalent document; if they were self-employed, they will also need to submit a signed and typed statement with the amount of their Adjusted Gross Income (AGI) and estimated U.S. income taxes paid, please use the "Financial Aid Statement Form".*

### Parent Nontax Filers

- ☐ Neither parent was employed, and neither had income earned from work in 2015.
- ☐ One or both parents were employed in 2015 and have listed below the names of the employer(s) and the amount earned from each employer in 2015. Please provide copies of all 2015 IRS W-2 forms issued by the parent(s) employer(s). List every employer even if the employer did not issue an IRS W-2 form. *If you are unable to provide a W-2 form, you must indicate a reason why you are unable to provide your wage statements.*

Employer's Name	2015 Amount Earned	IRS W-2 Provided? If no, state reason
Example: Alfred's Auto Body Shop	Example: \$2,000.00	Example: Yes

#### **D. Untaxed Income Information**

In 2015, did you or your parent(s) have any untaxed portions of an IRA Distribution(s) that was a rollover?

- ☐ Yes (attach a copy of Form 1099-R for the IRA distribution) ☐ No

In 2015, did you or your parent(s) have any untaxed portions of a Pension(s) Distribution(s) that was a rollover?

- ☐ Yes (attach a copy of Form 1099-R for the Pension distribution) ☐ No

#### **E. High School Completion Status**

Please check the box (ONLY ONE) that indicates your high school completion status:

☐ **High School Diploma**

Please submit:

- Copy of the student's high school diploma; or
- Copy of the student's final high school transcript that shows the date when the diploma was awarded

☐ **State Certificate**

Please submit:

- Copy of the certificate the student received after passing a state-authorized examination, which the state recognizes as the equivalent of a high school diploma

☐ **Home Schooled Student**

Please submit:

- A transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student has completed and documentation that the student has successfully completed secondary school education

☐ **GED Completion**

Please submit:

- Copy of the student's GED Certificate; or
- Copy of the student's GED transcript

☐ **Two-Year Program Completion**

Please submit:

- Copy of the student's academic transcript that indicates the student has completed at least a two-year program that is acceptable for full credit toward a bachelor's degree

☐ **Former member of the military who is unable to obtain other high school completion status documentation**

Please submit:

- DD Form 214: Certificate of Release or Discharge from Active Duty indicating you are a high school graduate or equivalent

**NOTE:** If the student is unable to obtain the documentation requested to support their high school completion status, or, you have provided this information in a prior year, he or she must contact the financial aid office.

#### **F. Documentation of Identity / Statement of Educational Purpose**

In order to complete the verification process, you will need to appear in person at the CSU Channel Islands Financial Aid & Scholarships office and present your unexpired government issued ID (such as a driver's license, military ID, passport, etc.) and this verification worksheet to an institutionally authorized financial aid administrator. Your financial aid administrator will need to validate the statement below at the time of submission by maintaining a copy of your photo ID and by providing a signature and date.

##### **Statement of Educational Purpose**

I certify that I, \_\_\_\_\_, am the individual signing this Statement of Educational Purpose and that the federal  
(Print Student's Name)

student financial assistance I may receive will only be used for educational purposes to pay the cost of attending CSU Channel Islands for 2017-2018.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's ID Number

\_\_\_\_\_  
Financial Aid Administrator Signature

\_\_\_\_\_  
Date

##### **Notary's Certificate of Knowledge**

If you cannot appear in person to submit this worksheet, you will need to provide a copy of your government issued ID and this worksheet notarized by a public notary.

State of \_\_\_\_\_ City/County of \_\_\_\_\_ on \_\_\_\_\_

before me \_\_\_\_\_ personally appeared \_\_\_\_\_ and proved to me on the basis of  
(Notary's Name) (Printed name of signer)

satisfactory evidence of identification, \_\_\_\_\_, to be the above-named person who signed the foregoing  
(Type of government-issued photo ID provided)

**WITNESS my hand and official seal**

\_\_\_\_\_  
(Notary Signature)

\_\_\_\_\_  
(Date commission expires)

\_\_\_\_\_  
(seal)

**G. Certification and Signature**

The student and one parent must sign and date below. Each person signing this worksheet certifies that all of the information reported on this form is true and accurate to the best of their knowledge.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

**WARNING:**

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

**PLEASE RETURN THIS FORM TO THE CSU CHANNEL ISLANDS FINANCIAL AID & SCHOLARSHIPS OFFICE**