2018–2019 TUSM Verification Worksheet (V5)

Your 2018–2019 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. Please complete and sign the TUSM institutional verification document, attach any required documents, and submit the form and other required documents to the Office of Financial Aid. We may ask for additional information after reviewing this document. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

A. Student’s Information

Last Name                  First Name             M.I.   Student ID Number or SSN

_____________________________________________        ____________________________

Address        Date of Birth

_____________________________________________        ___________________________

City    State    Zip Code   Email Address

_____________________________________________        ____________________________

Home Phone Number       Cell Phone Number

B. Household Information

List below the people in the student’s household. Include:

- The student
- The student’s spouse, if the student is married
- The student’s or spouse’s children if the student or spouse will provide more than half of their support from July 1, 2018, through June 30, 2019, even if the children do not live with the student
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2019

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 an eligible postsecondary educational institution any time between July 1, 2018, and June 30, 2019.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
<th>Will be Enrolled at Least Half Time (Yes or No)</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith (example)</td>
<td>23</td>
<td>Self</td>
<td>TUSM</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.
C. Income Information to Be Verified

STUDENT TAX FILERS

Complete this section if you, the student, filed or will file a 2016 income tax return with the IRS. **If married, you must include spouse’s information as well. Tax Return Filers must submit 2016 W-2 forms for any employment or other income received in 2016 by student (and spouse if married).**

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

Check the box that applies:

- [ ] I have used the IRS DRT in FAFSA on the Web to transfer 2016 IRS income tax return information into the student’s FAFSA. **TUSM will use the IRS information that was transferred in the verification process.**

- [ ] I have not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2016 IRS income tax return information into the student’s FAFSA. See instructions above for information on how to use the IRS Data Retrieval Tool. The verification process will not be complete until your IRS information has been transferred into your FAFSA.

- [ ] I am unable or choose not to the IRS DRT in FAFSA on the Web, and instead will provide the school with a 2016 IRS tax return transcript(s) – Please note that photocopies of the income tax return are no longer acceptable.

A 2016 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by MAIL** – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript.” Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”

- **Get Transcript ONLINE** – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”

- **Automated Telephone Request** – 1-800-908-9946

- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T

If the student and spouse filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Return Transcript(s)** must be provided for each.

- [ ] Check here if an IRS tax return transcript(s) is attached to this worksheet.

- [ ] Check here if an IRS tax return transcript(s) will be submitted to TUSM. **Verification cannot be completed until the IRS tax return transcript(s) has been submitted.**

**Tax Return Filers must submit 2016 W-2 forms for any employment or other income received in 2016 by student (and spouse if married).**
Check the box that applies:

☐ The student (and spouse if married) was not employed and had no income earned from work in 2016.

☐ The student and/or spouse were employed in 2016 and have listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. Provide copies of all 2016 W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>2016 Annual Amount Earned</th>
<th>IRS W-2 Provided?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suzy’s Auto Body Shop (example)</td>
<td>$2,000.00</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority. You may obtain a “Verification of Non-Filing Letter” by submitting the IRS Form 4506-T and checking box 7 located at www.irs.gov/form4506t.

☐ Check here if confirmation of non-filing is provided.

☐ Check here if confirmation of non-filing will be provided later.

D. High School Completion

Provide one of the following documents that indicate the student’s high school completion status when the student will begin college in 2018–2019:

☐ A copy of the student’s high school diploma.

☐ For students who completed secondary education in a foreign country, a copy of the “secondary school leaving certificate” or other similar document.

☐ A copy of the student’s final official high school transcript that shows the date when the diploma was awarded.

☐ A state certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).

☐ An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.

☐ For a student who was homeschooled in a state where state law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
For a student who was homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

*If the student is unable to obtain the documentation listed above, he or she must contact the financial aid office.*

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

The student must appear in person at **Tufts University’s School of Medicine Office of Financial Aid** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. The institution will maintain a copy of the student’s photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student’s ID.

The student must complete and sign in the presence of a TUSM Financial Aid Staff member. If unable, the student must sign this in front of a notary AND PROVIDE A COPY OF THE UNEXPIRED VALID GOVT ISSUED IDENTIFICATION ACKNOWLEDGED BY NOTARY:

**Statement of Educational Purpose**

I certify that I, _____________________________, am the individual signing this Statement of Educational Purpose and (Student’s name)

that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Tufts University School of Medicine for 2018-2019.

________________________________    ___________________ ______________________
Student’s Signature      Date     Student’s ID Number

**TUSM FINANCIAL AID OFFICE USE ONLY**

Verification of Government Issued ID (check which document is copied for review)

_____Driver’s License _____Non-Driving State ID _____Military ID _____Passport

Received by: ___________________________ Signature: ___________________________ Date: ___________________________
THE NOTARY’S CERTIFICATE OF ACKNOWLEDGEMENT IS ONLY REQUIRED IF YOU ARE UNABLE TO COMPLETE AND SIGN THE ABOVE STATEMENT OF EDUCATIONAL PURPOSE, AND WITNESSED BY A TUSM FINANCIAL AID STAFF MEMBER. IF SO, YOU MUST SIGN THE ABOVE STATEMENT OF EDUCATIONAL PURPOSE IN THE WITNESS OF A NOTARY PUBLIC AND ATTEND TO THE FOLLOWING:

**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 Tufts University School of Medicine for 2018-2019.

________________________________    ___________________ ______________________
Student’s Signature      Date     Student’s ID Number

**Notary’s Certificate of Acknowledgement**

State of ____________________ City/County of ___________________________ On___________________

before me, ____________________________, personally appeared, ___________________________ and ____________________________ (Notary’s name)     (printed name of signer)

proved to me on basis of satisfactory evidence of identification __________________________________________________________________________________________

(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal __________________________________________

(Notary signature)        (Date Commission Expires)

(Seal)

**Certification and Signature**

By signing below, I certify that all of the information reported is complete and accurate.

________________________________________ ________________________________________________
Student’s Name     Student’s Signature    Date

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