

Student Name: _____ **Roosevelt ID:** _____

Your 2018–2019 Free Application for Federal Student Aid (FAFSA) has been selected for federal verification. Federal regulations state that to confirm federal student aid eligibility, we must verify the information reported on the FAFSA. You are required to submit this form. Electronic corrections may be made to your application as a result of the verification process, which may result in changes to your financial aid awards. Student name and RU ID are required on all pages submitted.

Your eligibility for federal student aid is not finalized until all required documents have been received and reviewed.

Verification review can take 14-21 days after all requirements have been submitted. The forms/requirements needed to verify your FAFSA are posted at RUAccess for your follow-up. You are responsible for the payment of any institutional charges due to Roosevelt University by the published due dates.

Student	<input type="checkbox"/>	I filed a 2016 federal tax return. My 2016 IRS Tax Transcript is attached.
Student	<input type="checkbox"/>	I filed a 2016 federal tax return and used the IRS Data Retrieval tool on my FAFSA.
Student	<input type="checkbox"/>	I filed a 2016 federal tax return. I was not eligible to use the IRS Data Retrieval tool on my FAFSA. My 2016 IRS Tax Transcript is attached.
Spouse	<input type="checkbox"/>	My spouse and I filed separate 2016 tax returns. The 2016 IRS Tax Transcript for my spouse is attached.
Parent/Stepparent	<input type="checkbox"/>	My parent(s) on my FAFSA filed a 2016 federal tax return. The 2016 IRS Tax Transcript for my parent is attached.
Parent/Stepparent	<input type="checkbox"/>	My parent(s) on my FAFSA filed a 2016 federal tax return and used the IRS Data Retrieval tool on my FAFSA.
Parent/Stepparent	<input type="checkbox"/>	My parent(s) on my FAFSA filed a 2016 federal tax return. My parent(s) was not eligible to use the IRS Data Retrieval tool on my FAFSA. My parent(s) 2016 IRS Tax Transcript is attached.
Parent/Stepparent	<input type="checkbox"/>	My parent(s) on my FAFSA filed separate 2016 tax returns. The 2016 IRS Tax Transcript for my other parent is attached.

To obtain a 2016 IRS Tax Transcript:

Get Transcript by Mail – Go to www.irs.gov. Under the ‘Tools’ heading select “Get a tax transcript.” Request “IRS Tax Transcript.” The transcript is generally received within 10 business days from the IRS’s receipt of your online request.

Get IRS Tax Transcript online – Go to www.irs.gov. Under the ‘Tools’ heading select “Get a tax transcript online” – To obtain the transcript online the person requesting the transcript must have (1) access to a valid email address, (2) a text enabled mobile phone in the user’s name, and (3) specific financial account numbers – such as a credit card, or mortgage or auto loan. The transcript will display online upon completion of the IRS two-step authentication.

Automated Telephone Request – Telephone 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.

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DEPENDENT STUDENTS (under age 24): Answer each question as it applies to you/the student and your parent(s)/step-parent(s) on the FAFSA. **If an item does not apply,** enter "N/A" for Not Applicable.

INDEPENDENT STUDENTS (age 24 or older): Answer each question as it applies to you/the student (and your spouse, if married) on the FAFSA. **If an item does not apply,** enter "N/A" for Not Applicable.

2016 Taxed Income

A. Adjusted Gross Income for 2016

Wages, Alimony, Social Security, Business Income		Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

B. U.S. Income Tax Paid for 2016

List the actual dollar amount from IRS Form 1040/Subtract line 46 from line 56, or from IRS Form 1040A/Subtract line 36 from line 28, or from IRS Form 1040EZ/Line 10.

Total Income Tax Paid	Form 1040 or 1040A	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

2016 Other Untaxed Income

A. Untaxed Portions of Individual Retirement Account (IRA) distributions

List the actual amount from IRS form 1040/line 15A minus 15b, or from IRS form 1040A/Line 11a minus 11b. Do not list "Rollover" amounts.

2016 Untaxed Portions of IRA Distributions	Form 1040 or 1040A	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

B. Untaxed Portions of Pensions.

List the actual amount from IRS form 1040/lines 16a minus 16b, or from IRS form 1040A/line 12a minus 12b. Do not list "Rollover" amounts.

2016 Untaxed Portions of Pensions	Form 1040 or 1040A	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

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C. Payments to an IRA or Keogh or other plan.

List the actual dollar amount from IRS form 1040/Line 28 + Line 32, or IRS form 1040A/Line 17.

Household Recipient	Type of Benefit Received	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

D. Tax Exempt Interest Income.

List the actual amount from IRS form 1040/line 8b, or from IRS form 1040A/Line 8b.

Household Recipient	Type of Veterans Non-education Benefit	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

E. Education Tax Credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit)

List the actual amount from IRS form 1040/Line 50, or from IRS form 1040A/Line 33.

Household Recipient	Type of Other Untaxed Income	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

By signing this form, I certify the information on this form and any attachments are accurate and complete to the best of my knowledge. If requested, I agree to provide documentation to verify the information I have provided on this form. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid and, I may be reported to the Office of the Inspector General and/or subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

PHYSICAL SIGNATURE – DO NOT TYPE		PHYSICAL SIGNATURE – DO NOT TYPE	
Student Signature	Date	Parent Signature (DEPENDENT ONLY)	Date

Submit this worksheet in person to FAS-1M16/Wabash Bldg, by email to fas@roosevelt.edu, or by fax to (312) 341-3545

RRAAREQ: VFORM