



**2017-18 DEPENDENT VERIFICATION WORKSHEET  
TRACKING GROUP V5 - AGGREGATE**

You have been selected for verification by the Department of Education. Please note that the best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.ed.gov](http://FAFSA.ed.gov). In most cases, no further documentation is needed to verify **2015 IRS income tax return** information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic filers, 2015 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT within 8–12 weeks after the 2015 paper IRS income tax return has been received by the IRS.

If you are not able to obtain an IRS DRT, you can request a tax return transcript from the IRS. To obtain a 2015 IRS Tax Return Transcript, go to [www.IRS.gov/transcript](http://www.IRS.gov/transcript) and click on the "Get Transcript Online" link, or call 1-800-908-9946. Make sure to request the "**IRS Tax Return Transcript**" and not the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the 2015 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2015 IRS income tax return).

**I. Student Information:**

\_\_\_\_\_  
Student's Last Name                      First Name                      M.I.

\_\_\_\_\_  
Student's Social Security Number

\_\_\_\_\_  
Student's Street Address (include apt. no.)

\_\_\_\_\_  
Student's Date of Birth

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
Student's Email Address

\_\_\_\_\_  
Student's Home Phone Number (include area code)

\_\_\_\_\_  
Student's Alternate or Cell Phone Number



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Student's Last Name                      First Name                      M.I.

**II. Number of Household Members and Number in College**

List below the people in the parents' household include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of their support from July 1, 2017, through June 30, 2018, or if the other children would be required to provide parental information if they were completing a FAFSA for 2017–2018. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.

For any household member, excluding the parents, who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July1, 2017, and June 30, 2018, include the name of the college. **Do not leave this section blank.**

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>		

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.



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\_\_\_\_\_  
Student's Last Name                      First Name                      M.I.

**III. Student Tax Filers (Non-filers skip to Section IV) - Check the box that applies:**

- The student has used the IRS DRT in FAFSA on the Web to transfer 2015 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript(s)**.  
(signature not required)
- The student has filed a foreign tax return and has attached a copy to the packet.

**OR**

**IV. Student Non-Tax Filers - Check the box that applies:**

- The student was not employed and had no income earned from work in 2015.
- The student was employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.  
\*\*\*If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	2015 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

Provide documentation from the IRS i.e. IRS "**Verification of Non-filing**" or other relevant tax authority dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority.

\_\_\_\_\_ Check here if confirmation of nonfiling is provided.

\_\_\_\_\_ Check here if confirmation of nonfiling will be provided later.



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**V. Parent Tax Filers (Non-filers Skip to Section VI) - Check the box that applies:**

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript(s)**. (signature not required)

If the parents filed separate 2015 IRS income tax returns, **2015 IRS Tax Return Transcripts** must be provided for both.

\_\_\_\_\_ Check here if a **2015 IRS Tax Return Transcript(s)** is provided.

\_\_\_\_\_ Check here if a **2015 IRS Tax Return Transcript(s)** will be provided later.

- The parent has filed a foreign tax return and has attached a copy to the packet.

\_\_\_\_\_ **OR** \_\_\_\_\_

**VI. Parent Non-Tax Filers - Check the box that applies:**

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2015 income tax return with the IRS.

**Check the box that applies:**

- Neither parent was employed nor had no income earned from work in 2015.
- One or both parents were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

\*\*\*If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	2015 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

Provide documentation from the IRS i.e. IRS "**Verification of Non-filing**" or other relevant tax authority dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority.

\_\_\_\_\_ Check here if confirmation of nonfiling is provided.

\_\_\_\_\_ Check here if confirmation of nonfiling will be provided later.



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Student's Last Name                      First Name                      M.I.

### **VII. 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 2017–2018. **Check** the box next to the item you will be submitting.

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate or GED transcript.
- 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.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (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 documents the successful completion of 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.



Student's Last Name                      First Name                      M.I.

**VIII. Identity and Statement of Educational Purpose**

Please note that the student must complete either option one or two below. Option one must be signed at the institution. Option two must be notarized.

**1. Must Be Signed at the Institution**

The student must appear in person at \_\_\_\_\_ to  
(Name of Postsecondary Educational Institution)

verify his or her identity by presenting a 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 with the date it was received and the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, in the presence of the institutional official, the following:

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

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

\_\_\_\_\_ for 2017-2018.  
(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)



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\_\_\_\_\_  
Student's Last Name                  First Name                  M.I.

**2. Must Be Signed With Notary**

If the student is unable to appear in person at \_\_\_\_\_  
(Name of Postsecondary Educational Institution)

to verify his or her identity, the student must provide:

- (a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

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 \_\_\_\_\_ for 2017-2018.

(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Notary's name)

personally appeared, \_\_\_\_\_, and provided to me  
(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of government-issued photo ID provided)

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

**WITNESS my hand and official seal**  
(seal)

\_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_  
(Date)



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**IX. Certifications and Signatures**

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must **hand-sign** and date. ***(No electronic signatures are accepted)***

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

\_\_\_\_\_  
Print Student's Name

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

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

Submit in Person: **Hawai'i Pacific University Financial Aid Office**  
1164 Bishop Street, Suite 201  
Honolulu, Hawai'i 96813-2882

Submit by Email: [financialaid@hpu.edu](mailto:financialaid@hpu.edu)

Submit by FAX: (808) 544-0884