

PLEASE RESPOND TO THIS REQUEST WITHIN 30 DAYS OF POSTMARK

QUALITY ASSURANCE VERIFICATION

2016-2017

Your 2016-2017 Free Application for Federal Student Aid (FAFSA) was randomly selected for review in a process called "Quality Assurance" verification. Information from your FAFSA will be compared with a copy of your (and if married, your spouse's) 2015 Federal tax return transcript, and/or with other financial documents. Federal regulations state we have the right to ask you for this information before awarding Federal, State and institutional aid. If there are differences between your FAFSA information and your financial documents our office will send corrections electronically.

CHECKLIST

This checklist is to assist you with the "Quality Assurance" verification process and in the submittal of the required documentation. *After these documents are initially reviewed, further documentation may be required.*

STEP 1 Check off each item below that is listed as a verification requirement on your MyUTK account.

- Quality Assurance Verification Form (independent)**
- Student's successful IRS Data retrieval at www.FAFSA.gov; OR
Student 2015 Federal Income Tax Return Transcript (request from IRS 1-800-908-9946 or www.irs.gov)**
- Spouse's successful IRS Data retrieval at www.FAFSA.gov; OR
Spouse's 2015 Federal Income Tax Return Transcript (request from IRS 1-800-908-9946 or www.irs.gov)**

To obtain a **2015 IRS Tax Return Transcript**, go to www.IRS.gov and click on the "Order a Return or Account Transcript" 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). In most cases, for electronic filers, a **2015 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2015 IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the **2015 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2015 paper IRS income tax return has been received by the IRS.

- Student's 2015 W-2's and 1099's**
- Spouse's 2015 W-2's and 1099's**
- Other:**

STEP 2 Read all forms in their entirety and complete as directed. For all forms:

- 1. Do NOT leave any blanks. (If the answer is Zero, write \$0)**
- 2. All forms must have required signatures.**
- 3. Incomplete forms will be returned.**
- 4. Must be completed in Blue or Black Ink**

STEP 3 BEFORE submitting forms:

1. UT ID Number must be on all documents.
2. Retain copies of all documents to be submitted for your record. *The office will not return documents or provide copies at a later date.*

STEP 4 Submit ALL required documents checked under STEP 1 to the One Stop Express Student Services Center via mail or in person.

The University of Tennessee
Office of Financial Aid and Scholarships
Mail Stop 0230
Knoxville, TN 37996-0230
Phone: 865-974-1111
OneStop@utk.edu
<http://onestop.utk.edu/>

Hours: Monday – Friday from 8:00 am to 5:00 pm

UT ID Number							



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QUALITY ASSURANCE VERIFICATION WORKSHEET

INDEPENDENT STUDENT

Students' Last Name	First	MI	Date of Birth				
(Blue or Black Ink Only)				-		-	1 9
Phone Number							
Home ()				Cell ()			
Address							
Street:						Apt/Suite No.	
City:			State		Zip Code		

TAX FORMS AND INCOME INFORMATION

This section must be completed by: Student and Spouse

Student's Income Information		Spouse's Income Information		
***Tax filers only		***Tax filers only		
<input type="checkbox"/> Check here if you used the IRS Data Retrieval Tool. <input type="checkbox"/> Check here if you did not use the IRS Data Retrieval Tool. You must request a tax return transcript from the Internal Revenue Service at 1 – 800 – 908 – 9946 or www.irs.gov <input type="checkbox"/> Check here if you do not have W-2's or 1099's		<input type="checkbox"/> Check here if you used the IRS Data Retrieval Tool. <input type="checkbox"/> Check here if you did not use the IRS Data Retrieval Tool. You must request a tax return transcript from the Internal Revenue Service at 1 – 800 – 908 – 9946 or www.irs.gov <input type="checkbox"/> Check here if you do not have W-2's or 1099's		
***Non-Tax filers only		***Non-Tax filers only		
<input type="checkbox"/> Check here if you were UNEMPLOYED for the entire year of 2015 and will not file a tax return. <input type="checkbox"/> Check here if you were employed in 2015, but will not file and are not required to file a U.S. income tax return. Please list below employer(s) and any income earned in 2015 (use your W-2 form or other earnings statement).		<input type="checkbox"/> Check here if you were UNEMPLOYED for the entire year of 2015 and will not file a tax return. <input type="checkbox"/> Check here if you were employed in 2015, but will not file and are not required to file a U.S. income tax return. Please list below employer(s) and any income earned in 2015 (use your W-2 form or other earnings statement).		
Employer	Amount of Earnings	Employer	Amount of Earnings	
Employer	Amount of Earnings	Employer	Amount of Earnings	
List all the people in your household. Include yourself and, <ul style="list-style-type: none"> Your spouse, if you are married Your children, if any, if you will provide more than half of their support from July 1, 2016, through June 30, 2017, or if the children would be required to provide your information if they were completing a FAFSA for 2016–2017. Include children who meet either of these standards, even if they do not live with you. Other people if they now live with you AND you provide more than half of their support and will continue to provide more than half of their support through June 30, 2017. 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, 2016, and June 30, 2017.				
Full Name	Age	Relationship to Student	College	Will be enrolled at least half time

UT ID Number



Federal Benefits: In 2014 or 2015, did you receive benefits from any of the federal benefit programs listed? Mark all the programs that apply.

SNAP/Food Stamps SSI WIC TANF Free or Reduced Lunch

As of the date you filed your FAFSA was either of your parents a dislocated worker? Circle one: YES NO

List the **TOTAL** yearly amount received in 2015. If the answer is zero, write \$0 in the space provided; if any are left **BLANK** this form will be returned to you.

Student (and Spouse)	Additional Financial Information
\$	Education credits (Hope and lifetime learning tax credits) from IRS form 1040 – line 50 or 1040A – line 33.
\$	Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household Please list child/children's name(s):
\$	Tax filers only: Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
\$	Tax filers only: Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.
\$	Military only: Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q.
Student (And Spouse)	Untaxed Income
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a -12d, codes D, E, F, G, H, and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits)
\$	Child support you received for all children. Don't include foster care or adoption payments.
\$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Do not include value of on-base housing or value of a basic military allowance for housing.
\$	Veterans' non-educational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
\$	Other untaxed income such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans).
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.

SIGN THIS WORKSHEET

I certify that all the information provided on this form is complete and correct. By signing this form, permission is given to the Office of Financial Aid and Scholarships to make corrections electronically to your application if there are differences between your application and your submitted documentation.

Student signature

Date

Spouse signature

Date

WARNING
Purposely giving false or misleading information may result in a fine, jail sentence or both.