

# SUNY FREDONIA

**INDEPENDENT**

## 2013-2014 Verification Worksheet Federal Student Aid Programs

Office of Financial Aid  
209 Maytum Hall  
Fredonia, NY 14063  
Phone#: (716) 673-3253  
Fax#: (716) 673-3785

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your FAFSA with information on this worksheet and other financial documents. *The law says we have the right to ask you for this information before awarding Federal aid.* If there are differences between your FAFSA information and your financial documents, you or the Office of Financial Aid may need to make corrections electronically.

**Complete this verification form (do NOT leave any lines blank) and submit it to the Office of Financial Aid as soon as possible, so that your financial aid won't be delayed. This process can take up to six weeks. Your financial aid administrator will help you if you have any questions.**

### A. Student Information

_____ Last Name	_____ First Name	_____ M.I.	_____ Student's Fredonia ID Number
_____ Address (include apt. no.)			_____ Date of Birth
_____ City	_____ State	_____ Zip Code	_____ Phone Number (include area code)

### B. Family Information

List the people that you (and your spouse) will support between July 1, 2013 and June 30, 2014. Include:

- \* yourself
- \* your spouse
- \* your dependent children (if you provide more than half of their support even if they do not live with you).

Include other people as part of your family only if:

- \*they now live with you, and you provide more than half their support **AND**
- \*you will continue to provide more than half their support from July 1, 2013 through June 30, 2014.

Write the names of **all household members** in the space(s) below. Also write in the name of the college for any family member who will be attending college **at least half-time** between July 1, 2013 and June 30, 2014, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College (At least half time)
		<i>Self</i>	<i>SUNY Fredonia</i>

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, Washington, DC 20202-5345.

## C. Verifying Income Information

Independent

**According to federal regulations schools will no longer be able to accept photocopies of tax returns.**

The best way to verify income is by using the **IRS Data Retrieval Tool** when completing or updating your FAFSA on the web. If you do not use this method when completing or updating your FAFSA you must submit an **IRS Tax Return Transcript**. To request an IRS Tax Return Transcript please visit [www.irs.gov](http://www.irs.gov) and use Form 4506-T, or go to the "Tools" section on their website and click on "Order a Transcript", or call **1-800-908-9946**. Be sure to only request a Tax Return Transcript, NOT an Account Transcript. After using the IRS Data Retrieval tool students are advised to not make any changes to either student's/spouse's income information on their FAFSA. Please contact the Office of Financial Aid if you had a change in income that is not reflected on your FAFSA.

## D. Student's Income Information

Check only one box below. See "Verifying Income Information" section on how to request your IRS Tax Return Transcript. Also foreign tax return filers may submit signed photocopies of their foreign tax return.

- Check here if you did file a 2012 Federal Tax Return and you used the IRS Data Retrieval process when completing/updating your 2013-2014 FAFSA. Data Retrieval completed on \_\_\_\_\_
- Check here if you did file a 2012 Federal Tax Return and a 2012 Federal Tax Return Transcript is attached. (See section C above )
- Check here if you did NOT file a 2012 Federal Tax Return and weren't required to. If you did not file a 2012 Federal Tax Return but did work in 2012 and had earnings please submit a signed statement saying so along with copies of your W-2(s) and/or yearly income statements.  
Write in the amount you earned in 2012. \$ \_\_\_\_\_

## E. Spouse's Income Information (if student is married).

Check only one box below. See "Verifying Income Information" section on how to request your IRS Tax Return Transcript. Also foreign tax return filers may submit signed photocopies of their foreign tax return.

- Check here if your spouse did file a 2012 Federal Tax Return and you used the IRS Data Retrieval process when completing/updating your 2013-2014 FAFSA.
- Check here if your spouse did file a 2012 Federal Tax Return and a 2012 Federal Tax Return Transcript is attached. (If you and your spouse filed as "Married Filing Separately" a 2012 Federal Tax Return Transcript for both of you must be submitted)
- Check here if your spouse did NOT file a 2012 Federal Tax Return and wasn't required to. If they did not file a 2012 Federal Tax Return but did work in 2012 and had earnings please submit a signed statement saying so along with copies of their W-2(s) and/or yearly income statements.  
Write in the amount they earned in 2012. \$ \_\_\_\_\_

## F. Food Stamps/Supplemental Nutrition Assistance Program (SNAP)

Complete this section if someone in your household (listed in Section B) received Food Stamp/SNAP Benefits in 2011 or 2012. Check only one box below.

- YES, one of the persons listed in Section B of this worksheet received Food Stamp/SNAP benefits in 2011 and/or 2012. (If asked I will provide documentation of the receipt of this.)
- NO, none of the persons listed in Section B of this worksheet received Food Stamps/SNAP benefits in 2011 and/or 2012

## G. Child Support Paid

Did you or your spouse (if applicable) listed in Section B of this worksheet **PAY** child support for the year of 2012?

YES

NO

If yes, complete the following chart:

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid to	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2012

## H. Additional Financial Information – Answer all questions

### 2012 Additional Financial Info

#### Student/Spouse

#### Report Annual Amounts

- \$ Taxable earnings from need-based employment programs, such as **Federal Work-Study** and need based employment portions of fellowships and assistantships. \_\_\_\_\_
- \$ Taxable 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 fellowship and assistantships. \_\_\_\_\_
- \$ Combat pay or special combat pay. (Only enter the amount that was taxable and included in the adjusted gross income. **Don't include** untaxed combat pay. \_\_\_\_\_
- \$ Earnings from work under a cooperative education program offered by a college \_\_\_\_\_
- \$ Annual amount of child support **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). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing \$ \_\_\_\_\_
- \$ Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. \_\_\_\_\_
- Any other untaxed income or benefits not reported elsewhere, such as workers' compensation, disability, etc. Also include first-time homebuyer tax credit from IRS Form 1040-line 67. **Don't include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements ( e.g., cafeteria), foreign income exclusion or credit for federal tax on special fuels \$ \_\_\_\_\_
- \$ Money **received**, or paid on your behalf (e.g., bills), not reported elsewhere on this form. \_\_\_\_\_

\$ \_\_\_\_\_ Total

## F. Sign this Worksheet

By signing this worksheet, I (we) certify that all information reported to qualify for Federal student aid is complete and correct. If married, spouse's signature is optional.

**Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse Date

**SUNY FREDONIA  
OFFICE OF FINANCIAL**

**AID**

**209 MAYTUM HALL**

**PLEASE DO NOT SUBMIT THIS WORKSHEET  
UNTIL YOU HAVE INCLUDED THE  
FOLLOWING DOCUMENTS:**

- Student's and Spouse's (*if applicable*) tax filer income information either by the IRS Data Retrieval Process on the fafsa or 2012 IRS Federal Tax Return Transcript (see section C)
- If you did not file a 2012 Federal Tax Return and are not required to, submit a signed statement saying so along with proof of income such as a 2012 W-2
- If an Amended Tax Return was filed for Student/Spouse in 2012 submit a copy of your 2012 1040x
- If a 2012 1099-R was received for the Student's/Spouse's Pension/IRA distribution please submit a copy
- If Food Stamps – Supplemental Nutrition Assistance Program (SNAP) was received in 2011 or 2012 make sure to complete the section in the worksheet pertaining to Food Stamps

**DO NOT LEAVE ANY LINES BLANK INSTEAD PLACE A “0”  
FOR THE ANSWER IF THERE IS NO INCOME**

**\*\*\*VERIFICATION WILL NOT BE COMPLETED UNLESS ALL OF THE  
APPROPRIATE DOCUMENTATION LISTED ABOVE/REQUESTED IS  
SUBMITTED\*\*\***