

2013–2014 VERIFICATION INSTRUCTION SHEET

This instruction sheet is to be used to assist you in answering questions on the Verification Form.

The Verification Form begins with page 2 of this packet.

#1-TAX AND INCOME INFORMATION

NEW Due to changes in federal regulations, we can no longer accept copies of your tax return. You may not be required to submit any additional tax forms – please check your MAX account to see what forms are required to be submitted. If the taxes are required, you must obtain a TAX RETURN TRANSCRIPT. Please note, the tax return transcript does NOT need to be signed. This can be requested from the IRS in one of the following ways:

- 1) Online at www.irs.gov. Be sure to request the RETURN TRANSCRIPT (under Tools)
 - You need the SSN, DOB, & address of the primary filer (the first person listed on the tax return)
- 2) By phone at 1-800-908-9946
- 3) By completing a Form 4506T-EZ, which can be obtained online at www.irs.gov.

IF ORDERING THE TAX RETURN TRANSCRIPT, PLEASE WAIT UNTIL YOU RECEIVE IT TO SEND IN ALL MATERIALS. WE CANNOT PROCESS THE VERIFICATION WITHOUT THE TAX RETURN TRANSCRIPT (UNLESS IT IS ALREADY WAIVED ON MAX).

#2-FOR DEPENDENT STUDENTS - HOUSEHOLD CHART (PAGE 3)

- 1) Write the student's name and age on the first line.
- 2) Based on the marital status of your parents, list the names and ages according to the following guidelines:
 - **Married** – list both your mother and father (biological parents are both living and married to each other)
 - **Remarried** – list your custodial parent (with whom you reside and/or provides your support) and his/her spouse (the student's stepparent).
 - **Single** – list the name of the parent with whom you reside and/or provides your support.
 - **Divorced/Separated** – list the name of the parent with whom you reside and/or provides your support. Do not list the non-custodial parent (the one not in the household).
 - **Widowed** – list the name of the parent with whom you reside and/or provides your support (the surviving parent).
- 3) On the remaining lines, list other children and other people if they now live with your parents **AND** if your parents will provide more than half of their support between **07/01/2013** and **06/30/2014**. Support includes money, gifts, loans, housing, food, clothes, car, medical and dental care, college costs, etc.
- 4) Write in the name of the college for any household member, **excluding your parents/stepparents**, who will be attending college at least half time between **07/01/2013** through **06/30/2014** and will be enrolled in a degree program. (*Attach a separate sheet if necessary.*)

#3-FOR INDEPENDENT STUDENTS - HOUSEHOLD CHART (PAGE 4)

- 1) Write your name and age on the first line.
- 2) Based on your marital status, list the names and ages according to the following guidelines:
 - **Single/Divorced/Widowed** – list only yourself (do not list a spouse)
 - **Married/Remarried** – list both you and your spouse.
 - **Separated** – list only yourself, not your spouse. (This only applies if you are separated, not divorced.)
- 3) On the remaining lines, list other children and other people if they now live with you **AND** if you will provide more than half of their support between **07/01/2013** and **06/30/2014**. Support includes money, gifts, loans, housing, food, clothes, car, medical and dental care, college costs, etc.
- 4) Write in the name of the college for any household member who will be attending college at least half-time between **07/01/2013** through **06/30/2014** and will be enrolled in a degree program. (*Attach a separate sheet if necessary.*)

Your Free Application for Federal Student Aid (FAFSA) has been selected for review in a process called "Verification." In this process, the Office of Financial Aid will be comparing information from your application with your and your parents' (if dependent) tax and non-tax information. Federal law indicates that the Office of Financial Aid has the right to ask for this documentation before awarding Federal aid. If there are differences between your application information and your financial documents, the Financial Aid Counselor will correct this information and electronically reprocess the updated information.

ALL SECTIONS OF THIS FORM MUST BE COMPLETED OR IT WILL BE RETURNED TO YOU FOR COMPLETION

Complete this form and submit all requested documentation to:

MILLERSVILLE UNIVERSITY
OFFICE OF FINANCIAL AID
PO BOX 1002
MILLERSVILLE, PA 17551-0302

FAX: 717-871-2248
PHONE: 717-872-3026

PAGE 1 – APPLICANT INFORMATION AND DETERMINATION OF STUDENT STATUS

PLEASE PRINT CLEARLY

Student's Name: _____ Student ID Number or SSN: _____

Home Address: _____

Telephone: (____) _____ Street _____ City _____ State _____ ZIP _____
(number to be reached 8am -5pm) NUMBER TYPE ☐ Home ☐ Work ☐ Cell

Date of Birth: ____/____/____ Gender: ☐ Male ☐ Female

Contact Email: _____

Will be used to contact you for the Verification process only – in case any additional information or clarification is required. By providing an email address, you authorize us to communicate via email for verification information.

ANSWER ALL ELEVEN QUESTIONS

1. Were you born before January 1, 1990? ☐ YES ☐ NO
2. As of the date you filed the FAFSA, are you married? (Answer "Yes" if you are separated but not divorced.) . . . ☐ YES ☐ NO
3. At the beginning of the 2013-2014 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD or graduate certification, etc.)? ☐ YES ☐ NO
4. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training? ☐ YES ☐ NO
5. Are you a veteran of the U.S. Armed Forces? ☐ YES ☐ NO
6. Do you have children who receive more than half of their support from you between 07/01/13 and 06/30/14? . . . ☐ YES ☐ NO
7. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2014? ☐ YES ☐ NO
8. At any time since you turned age 13, were both of your parents deceased, were you in foster care, or were you a dependent or ward of the court? ☐ YES ☐ NO
9. Are you currently or were you (before you turned 18) an emancipated minor as determined by a court in your current state of residence or your state of legal residence at the time you received the determination? ☐ YES ☐ NO
10. Are you currently or were you (before you turned 18) in legal guardianship as determined by a court in your current state of residence or your state of legal residence at the time you received the determination? ☐ YES ☐ NO
11. On or after July 1, 2012, do you have a written determination that you were homeless or at risk of being homeless? . ☐ YES ☐ NO

IF YOU ANSWERED "NO" TO ALL ELEVEN QUESTIONS, COMPLETE PAGES 3 AND 5 OF THIS VERIFICATION FORM.

IF YOU ANSWERED "YES" TO ANY QUESTION, COMPLETE PAGES 4 AND 5 OF THIS VERIFICATION FORM.

**FOR OFFICE
USE ONLY**

Date Completed: ____/____/____ EFC: _____

☐ REGULAR EFC ☐ SIMPLIFIED EFC ☐ AUTO ZERO EFC



F A V E R I F

1 3 1 4

PARENTS' MARITAL STATUS AS OF TODAY (CIRCLE ONE) **DATE OF MARITAL STATUS** _____
 (Date your parents were married, remarried, divorced, separated, or widowed)

1. MARRIED/REMARRIED 2. SINGLE 3. DIVORCED/SEPARATED 4. WIDOWED

PLEASE COMPLETE THE FAMILY CHART – REFER TO THE VERIFICATION INSTRUCTION SHEET #2

[illegible]

PARENTS/STEPPARENTS' 2012 FEDERAL TAXES:

Did your parents file a **2012 IRS Federal Tax Return** (Form 1040, 1040A, 1040EZ) or a tax return for Puerto Rico or other foreign country?
(*Check one*)

☐ **YES** — refer to the Verification Instruction Sheet - #1.

☐ **NO** — By checking this box, your parents are verifying they did not complete a federal tax return for 2012 and are not required by the IRS to file taxes. Please verify the amount and sources of income by completing the information below or by submitting all W-2 forms and/or information regarding your parents' income during 2012.

Source of income	Amount	Source of income	Amount

STUDENT'S 2012 FEDERAL TAXES:

Did you file a **2012 IRS Federal Tax Return** (Form 1040, 1040A, 1040EZ) or a tax return for Puerto Rico or other foreign country?
(*Check one*)

☐ **YES** — refer to the Verification Instruction Sheet - #1.

☐ **NO** — By checking this box, you are verifying that you did not complete a federal tax return for 2012 and are not required by the IRS to file taxes. Please verify the amount and sources of income by completing the information below or by submitting all W-2 forms and/or information regarding your income during 2012.

[illegible]

One of the persons listed in the household (above) received SNAP benefits (food stamps) in 2011 or 2012. I can provide documentation, if it is requested. ☐ YES ☐ NO

By signing this Verification Form, we certify that all of the information reported on it is complete and correct. (The student and at least one parent must sign.)

Student Signature	Date
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Parent Signature _____ Date _____

STUDENT'S MARITAL STATUS AS OF THE DATE YOU FILED THE FAFSA (CIRCLE ONE) **DATE OF MARITAL STATUS** _____
 (Date you were married, remarried, divorced, separated, or widowed)

1. SINGLE

2. MARRIED/REMARRIED

3. SEPARATED

4. DIVORCED/WIDOWED

PLEASE COMPLETE THE FAMILY CHART – REFER TO THE VERIFICATION INSTRUCTION SHEET #3

Full Name of Family Member	Age	Relationship to Student	Name of College – Enrolled at least half-time 7/1/13 – 6/30/14
		Student	Millersville University

STUDENT'S 2012 FEDERAL TAX FORM:

Did you (and your spouse) file a **2012 IRS Federal Tax Return** (Form 1040, 1040A, 1040EZ) or a tax return for Puerto Rico or other foreign country? (**Check one**)

☐ **YES** — refer to the Verification Instruction Sheet - #1.

☐ **NO** — By checking this box, you are verifying that you did not complete a federal tax return for 2012 and are not required by the IRS to file taxes. Please verify the amount and sources of income by completing the information below or by submitting all W-2 forms and/or information regarding your income during 2012.

Source of income	Amount	Source of income	Amount
_____	_____	_____	_____
_____	_____	_____	_____

One of the persons listed in the household (above) received SNAP benefits (food stamps) in 2011 or 2012. I can provide documentation, if it is requested. ☐ **YES** ☐ **NO**

By signing this Verification Form, I certify that all of the information reported on it is complete and correct.

Student Signature

Date

PLEASE COMPLETE ALL BOXES EVEN IF YOU DID NOT FILE 2012 INCOME TAXES

Write "\$0" if no income was received from the specific source listed. Fill in ALL blanks.

Student / Spouse	2012 ADDITIONAL FINANCIAL INFORMATION	Parent(s) (Required for dependent students only)
\$	Child support you paid because of divorce or separation or as a result of a legal requirement. Do NOT include support for children in your (or your parents') household. Full name of the person child support was paid to: _____ Full name of child(ren) the child support was paid for: _____ _____ _____ <i>If this information is not provided, the child support paid amount will be changed to \$0.</i>	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 form in Box 12, Code Q.	\$
\$	Earnings from work under a cooperative education program offered by a college.	\$
Student / Spouse	2012 ADDITIONAL FINANCIAL INFORMATION	Parent(s) (Required for dependent students only)
\$	Payments to a 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 through 12d, codes D, E, F, G, H, & S.	\$
\$	Child support you received for all children. Do not 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 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.	\$
\$	Other untaxed income not reported elsewhere (e.g. workers' compensation, disability, etc.) Do not include student aid, earned income credits, additional tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, or benefits from flexible spending arrangements (e.g., cafeteria plans), 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.	\$

Millersville University does not discriminate on the basis of race, color, religion, national origin, ancestry, sex, age, or disability in admission or access to, or treatment or employment in, its programs and activities. This includes Title VI of the Civil Rights Act of 1964, Title IX of the Educational Amendments of 1972, and the Americans with Disabilities Act of 1990. Coordinators: Services for Students with Disabilities—Mrs. Sherlynn Bessick, Director, Office of Learning Services, Lyle Hall, 717-872-3178; Title VI and Title IX—Mr. Hiram Martinez, Assistant to the President for Social Equity and Diversity, Delaware House, 717-872-3787; ADA Coordinator—Mr. Louis DeSol, Associate Vice President for Human Resources, Dilworth Building, 717-872-3017.