

# 2012-2013 Verification Worksheet

## Federal Student Aid Programs

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your FAFSA application with copies of your and your spouse's 2011 Federal tax forms, or with W-2 forms or 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 application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

1. Submit the completed **2012-2013** Independent Verification Form. Make sure the form is **signed by the student**. This form is three -sided and needs to be filled out completely; if the answer is zero write "0", do not leave blank.
2. If the number in household and/or college you are reporting now on the Verification Worksheet does not match the number(s) you reported on the FAFSA, submit a written explanation of the discrepancy which must be **signed by the student**.
3. Submit **2011 Federal Tax Transcript(s)** and **W2 forms** for both student and spouse, if filed. As per federal regulations, we can no longer accept copies of the filed federal tax return unless it is specifically requested by the financial aid department. **You can obtain a Federal Tax Return Transcript by calling the IRS at 1-800-908-9946.**
4. **IF FILED:** The following schedules and forms are required from your tax return.
  - Schedule C** (business income)
  - Schedule E** (property rental, royalties, S corps, trusts, etc.)
  - 1099 R** (distributions from IRS, pensions and annuities etc.)
5. **If Food Stamps** were received by any household member reported on this form for 2010 or 2011 submit supporting documentation to verify this, such as a copy of the Food Stamp Benefit Card.
6. If child support was paid, submit a print-out of child support paid. Also indicate to whom it was paid and for which children.

### A. Student information

Last name	First name	M.I	YSU ID Number
Address (include apt. #)			Date of birth
City	State	Zip Code	Phone number (include area code) / Cell phone #

## B. Family Information

List the people in your household, including:

- yourself and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2012 through June 30, 2013, even if they do not live with you and
- 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 from July 1, 2012 through June 30, 2013

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2012 and June 30, 2013, 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
		Self	YSU

## C. Student's Tax Forms and Income Information (all applicants)

1. Check only one box below. Tax transcripts include the 2011 IRS transcript from filing Form 1040, 1040A, 1040EZ, and a tax return from Puerto Rico. Tax transcripts can be obtained by calling the IRS at 1-800-908-9946.

- ☐ Check here if you are attaching a copy of your tax transcript.  
☐ Check here if a tax transcript will be submitted to the school by \_\_\_\_\_ (date).  
☐ Check here if you will not file and are not required to file a 2011 U.S. Income Tax Return. (Submit copy of W-2 for each source of employment income.)

2. Funds received for child support and other untaxed income

Source of Untaxed Income	2011 Amount	Source of Untaxed Income	2011 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If you did not file and are not required to file a 2011 Federal income tax return, list below your employer(s) and any income received in 2011 (*You must provide the W-2 form or other earnings statements with this form.*)

Sources	2011 Income
	\$
	\$
	\$

## D. Spouse's Tax Forms and Income Information (if student is married)

1. Check only one box below. Tax transcripts include the 2011 IRS transcript from filing Form 1040, 1040A, 1040EZ, or a tax return from Puerto Rico. Tax transcripts can be obtained by calling the IRS at 1-800-908-9946.

- ☐ Check here if you are attaching a copy of your spouse's joint tax transcript.  
☐ Check here and attach spouse's tax transcript if your spouse filed a separate tax return.  
☐ Check here if spouse's tax transcript will be submitted to the school by \_\_\_\_\_ (date).  
☐ Check here if your spouse will not file and are not required to file a 2011 U.S. Income Tax Return. (Submit copy of W-2 for each source of employment income.)

2. Funds received for child support and other untaxed income

Source of Untaxed Income	2011 Amount	Source of Untaxed Income	2011 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If you did not file and are not required to file a 2011 Federal income tax return, list below your employer(s) and any income received in 2011 (*You must provide the W-2 form or other earnings statements with this form.*)

Sources	2011 Income
	\$
	\$
	\$

Student/Spouse	2011 Additional Financial Information	Parent(s)
\$	a. Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040—line 49 or 1040A—line 31.	\$
\$	b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household, as reported in question 94 (or question 73 for your parents).	\$
\$	c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	d. Grant and scholarship aid reported to the IRS in the adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	e. Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
\$	f. Earnings from work under a cooperative education program offered by a college.	\$
Student/Spouse	2011 Untaxed Income	Parent(s)
\$	a. 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 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$
\$	b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	\$
\$	c. Child support received for all children. Don't include foster care or adoption payments.	\$
\$	d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$
\$	e. Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$
\$	f. Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	h. Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	i. Other untaxed income not reported, such as workers' compensation, disability, etc. <b>Also include</b> the first-time homebuyer tax credit from IRS Form 1040—line 67. <b>Don't include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
\$	j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ XXXXXXXX

## Sign Worksheet

Each person signing this form certifies that all information reported on it is complete and correct. The student must sign and date.

Student

Date

Spouse

Date

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

Notes:

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