

2012-2013 Verification Worksheet Federal Student Aid Programs

Independent Students

OFFICE OF FINANCIAL AID

Your 2012–2013 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete, sign, and submit this worksheet, along with all 2011 W2's and any other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, please contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

Student's Last Name	Student's First Name	Student's 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	

B. Independent Student's Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.

A. Independent Student's Information

- Your children, if any, if you will provide more than half of their support from July 1, 2012, through June 30, 2013, or if the child would be required to provide your information if they were completing a FAFSA for 2012–2013. 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, 2013.

Include the name of the college for any household member who will be enrolled <u>at least half time</u>, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2012, and June 30, 2013. *If more space is needed, attach a separate page with your name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at
				Least Half Time
Marty Jones (example)	28	Wife	Central University	Yes
		Self		

Student's Name: SSN:					
C. Independent Student's Income Information to Be Verified	. Independent Student's Income Information to Be Verified				
1. TAX RETURN FILERS— Important Note: If you (or your spouse, if married) filed, or will file, an <u>amended 2011 IRS tax</u> return, you must contact your financial aid administrator before completing this section.					
Instructions : Complete this section if you, the student, filed or will file a 2011 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.					
Check the box that applies:					
I, the student, <u>have used</u> the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2011 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. <i>Your school will use the IRS information that was transferred in the verification process.</i>					
I, the student, <u>have not yet used</u> the IRS Data Retrieval Tool, but I will use the tool to transfer my (and, if married, my spouse's) 2011 IRS income information into my FAFSA once I have filed my 2011 IRS tax return. See instructions above for information on how to use the IRS Data Retrieval Tool. Your school cannot complete the verification process until you (and, if married, your spouse's) IRS information has been transferred into your FAFSA.					
I, the student, am <u>unable or choose not to</u> use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school 2011 IRS tax return transcript(s)—not photocopies of the income tax return. To obtain an IRS tax return transcript, go to <u>www.IRS.gov</u> and click on the "Order a Return or Account Transcript" link, or call I-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when your 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you are married and you and your spouse filed separate 2011 tax returns, you must submit tax return transcripts for both you and your spouse.					
Check here if an IRS tax return transcript(s) is attached to the	is worksheet.				
Check here if IRS tax return transcript(s) will be submitted to your school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to your school.					
2. TAX RETURN NONFILERS—Complete this section if you, the student (and, if married, your spouse), will not file and <u>are not required</u> to file a 2011 income tax return with the IRS.					
Check the box that applies:					
The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2011.					
The student (and/or the student's spouse if married) was employed in 2011 and has listed below the names of all employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top.					
Employer's Name	2011 Amount Earned	IRS W-2 Attached?			
Suzy's Auto Body Shop (example)	\$2,000.00	Yes			

Untaxed and Other Sources of Income Worksheet

Documentation of benefits, including denial or ineligibility for benefits, may be requested after review of the information you provide. **PLEASE DO NOT LEAVE ANY BLANKS. ENTER "0" IF NOT APPLICABLE.**

Student/Spouse	Additional Income:			
\$	Education credits (Hope, Lifetime Learning, and American Opportunity tax credits) from the IRS Form 1040 (line 49) or 1040a (line 31). (2011 federal taxes).			
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.			
\$	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Include AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship 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.			
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.			
Student/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 through 12d, codes D, E, F, G, H, and S. (2011 W2 forms).			
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040, line 28 + line 32, or 1040A, line 17. (2011 federal taxes)			
\$	Child support received for all children. Don't include foster care or adoption payments.			
\$	Tax exempt interest income from IRS Form 1040, line 8b or 1040A, line 8b. (2011 federal taxes)			
\$	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. (2011 federal taxes).			
\$	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. (2011 federal taxes).			
\$	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.			
\$	Veteran's non education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.			
\$	Other untaxed income not reported in items 92a through 92h, such as workers' compensation, disability, etc. Also include the 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 allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special funds.			
\$	Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.			
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.			

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, prosecuted for fraud, sentenced to jail, and/or face other charges, and will have to repay any financial aid funds you received.

ıdent's Name:		SSN:		
Independent Student's Ot	ner Information to Be Verified			
			. If asked by my school,	
. Complete this section if you or	your spouse, if married, paid child su	apport in 2011.		
below the name of the personames of the children for was for each child. If asked by space, attach a separate p	son who paid the child support, the nawhom child support was paid, and the my school, I will provide documenta age that includes your name and Social	ame of the person to whom the characteristic total annual amount of child suption of the payment of child suppled Security Number at the top.	nild support was paid, the port that was paid in 201 oort. If you need more	
Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2011	
Marty Jones(example)	Chris Smith	Terry Jones	\$6,000.00	
Certification and Signature	9			
I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature		WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.		
is optional.				
Student's Signature		Date		
Spouse's Signature		Date		
	Independent Student's Ott Complete this section if someon Nutrition Assistance Program of the persons listed in will provide documentation. Complete this section if you or the Either I, or if married my subshow the name of the person ames of the children for the for each child. If asked by space, attach a separate person with the Paid Child Support. Marty Jones (example) Certification and Signature I certify that all of the informate worksheet is complete and cornsign this worksheet. If married is optional. Student's Signature	Independent Student's Other Information to Be Verified Complete this section if someone in the student's household (listed in Nutrition Assistance Program or SNAP (formerly known as food stated in Nutrition Assistance Program or SNAP (formerly known as food stated in Section B of this worksheet receive will provide documentation of the receipt of SNAP benefits dure. Complete this section if you or your spouse, if married, paid child support was paid, and the foreach child in the spouse who is listed in Section B of the below the name of the person who paid the child support, the nation names of the children for whom child support was paid, and the foreach child. If asked by my school, I will provide documentate space, attach a separate page that includes your name and Social Name of Person Who Paid Child Support was Paid Marty Jones(example) Chris Smith Certification and Signature I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional. Student's Signature	Complete this section if someone in the student's household (listed in Section B) received benefits fr Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2010 or 2011 will provide documentation of the receipt of SNAP benefits during 2010 and/or 2011. One of the persons listed in Section B of this worksheet received SNAP benefits in 2010 or 2011 will provide documentation of the receipt of SNAP benefits during 2010 and/or 2011. Complete this section if you or your spouse, if married, paid child support in 2011. Either I, or if married my spouse who is listed in Section B of this worksheet, paid child support below the name of the person who paid the child support, the name of the person to whom the changes of the children for whom child support was paid, and the total annual amount of child support each child. If asked by my school, I will provide documentation of the payment of child support acade attach a separate page that includes your name and Social Security Number at the top. Name of Person Who Paid Name of Person to Whom Child Name of Child for Whom Support Was Paid Suppo	

You should make a copy of this worksheet for your records. This completed worksheet may be submitted by fax or U.S postal mail to the appropriate campus listed below:

The University of Southern Mississippi Office of Financial Aid 118 College Drive #5101 Hattiesburg, MS 39406 Phone: 601.266.4774

Fax: 601.266.5769

The University of Southern Mississippi Office of Financial Aid 730 East Beach Boulevard Long Beach, MS 39560 Phone: 228.865.4513

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Fax: 228.214.5415