

### A. Student Information

Banner ID: \_\_\_\_\_ Name: \_\_\_\_\_

Address (Street, City, State, Zip): \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Student's Cell Phone: \_\_\_\_\_

**WHAT IS VERIFICATION?** Verification is a federally mandated process by which aid offices compare the information reported on students' Free Application for Federal Student Aid (FAFSA) with tax documents and this worksheet. Your application has been selected for verification. **We cannot finalize your federal financial aid until you submit all required documentation.** Additional documents may be requested after your initial submission; students should monitor Banner regularly for account updates.

**DEADLINES:** Generally, students must complete verification before they cease enrollment or before the academic year ends, whichever happens first. Deadline details and general FAQs are available at [financialaid.buffalostate.edu/verification](http://financialaid.buffalostate.edu/verification).

#### Steps to Complete Verification

1. Complete all sections of this worksheet. Parent information is required for dependent students.
2. Collect the required tax documents for **2015** based on the student's dependency status.
3. Submit this form and all required tax documents to the Financial Aid Office. Include the student's Banner ID on all submissions. If submitting by email, please only submit pdf attachments.

#### Dependent Students

- Parent(s) Federal Tax Return Transcript or signed 1040 (if requested)
- Parent(s) W2's
- Student Federal Tax Return Transcript or signed 1040
- Student 2015 W2's
- Schedule C, E, or 1099R

#### Independent Students

- Student's Federal Tax Return Transcript or signed 1040 (if requested)
- Student's 2015 W2's
- Schedules C, E, or 1099R
- Above documents required for spouse, if married.

### B. Family Information

Check the appropriate dependency status for the student and fill in the household chart below.

- Dependent Students:** *In the chart below, list the people in your parents' household. Include the following:*
- (a) **yourself** even if you don't live with your parents;
  - (b) **your parent(s):** a parent is a person that the State has determined to be a legal parent which includes parents living together even if they are not married, same gender parents, and step-parent.
  - (c) **your parents' other children,** even if they don't live with your parent(s), if (1) your parents will provide more than half of their support from July 1, 2017 through June 30, 2018, or (2) the children would be required to provide parental information when applying for federal student aid; and
  - (d) **other people** if they now live with your parent's, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.
  - (e) If any household members will attend college at least half-time in a matriculated program between July 1, 2017 and June 30, 2018, write the name of the college he/she will attend in the space provided.
- Independent Students:** *Follow instructions above except for items (b)&(c). Include your spouse and any children.*

Full Name of Household Member	Age	Relationship to Student	College Name (if enrolled in 1718)
		Self	Buffalo State

attach a separate page as needed

**NOTE:** If a sibling listed above is 24 years of age or older, or if someone fits category (d) "other people", please submit the Other People in Household form which can be found at: [financialaid.buffalostate.edu/forms](http://financialaid.buffalostate.edu/forms).

**SUBMIT ALL REQUIRED DOCUMENTS TO:**

Financial Aid Office, MH 230; 1300 Elmwood Ave; Buffalo, NY 14222-1095  
[finaid@buffalostate.edu](mailto:finaid@buffalostate.edu) · (716) 878-4902 · fax (716) 878-4903

Banner ID: \_\_\_\_\_

## C1. Tax Filing Status for 2015 and Required Tax Forms

Dependent Student
<input type="checkbox"/> I did not work. <input type="checkbox"/> I worked but I have not filed and I am not required to file a tax return. <i>Next steps:</i> Submit your 2015 W-2 statements. <input type="checkbox"/> I filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a> . Also submit your W-2 statements, and where applicable, a 1099-R and/or Schedules C or E.

Parents of Dependent Students (parents listed on FAFSA)
<input type="checkbox"/> My parents did not work in 2015. Submit a written, detailed statement explaining how they supported their family with no income. Include supporting documentation as applicable (e.g., food stamp statement, social security statement). <input type="checkbox"/> My parents worked but have not filed and are not required to file a tax return. <i>Next steps:</i> Submit 2015 W-2 statements. <input type="checkbox"/> My parents filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a> . Also submit your W-2 statements, and where applicable, a 1099-R and/or Schedules C or E.

Independent Student
<input type="checkbox"/> I did not work. <i>Next steps:</i> submit a written, detailed statement explaining how you supported yourself with no income. <input type="checkbox"/> I worked but I have not filed and I am not required to file a tax return. <i>Next steps:</i> Submit your 2015 W-2 statements. <input type="checkbox"/> I filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a> . Also submit your W-2 statements, and where applicable, a 1099-R and/or Schedules C or E.

Independent Student's Spouse (if student is married today)
<input type="checkbox"/> My spouse did not work. <i>Next steps:</i> Submit a written statement explaining how your spouse was supported in 2015. <input type="checkbox"/> My spouse worked but has not filed and is not required to file a tax return. <i>Next steps:</i> Submit your 2015 W-2 statements. <input type="checkbox"/> My spouse filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a> . Also submit your W-2 statements, and where applicable, a 1099-R and/or Schedules C or E.

- ✓ To Obtain Tax Return Transcripts or W-2 Statements Immediately Online: [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript).
- ✓ To Obtain Paper W-2 Statements: contact your employer or go to <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.

## C2. Untaxed Income Received or Paid during 2015

Report all untaxed income received or paid during 2015 in the chart below. This section is required for both tax filers and non-tax filers. **If the answer is \$0, you must write \$0. Do not leave blanks.**

Untaxed Income Received or Paid during 2015	Student Include spouse if married	Parent(s) / step-parent of dependent students
Child support <b>paid</b> because of divorce or separation or legal requirement. <b>Do not include</b> support for children in your household, as reported on the front of this form.	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. <b>Submit related W2's.</b>	\$	\$
Taxable college grant and scholarship aid <b>reported to the IRS in your adjusted gross income.</b> Includes 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. Enter the taxable amount included in your adjusted gross income. <b>Don't include</b> untaxed combat pay. Combat pay is reported on the W2 in Box 12, Code Q.	\$	\$
Earnings from work under a cooperative education program offered by a college.	\$	\$
Child support <b>received</b> for any of your children. <b>Don't include</b> 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). <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	\$	\$
Veterans' non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$
Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form. <b>Indicate source:</b> _____	\$	Not applicable

## D. Sign This Worksheet

By signing this worksheet, I (we) certify that all the information reported is complete and correct. If you are a dependent student, at least one of your parents must sign.

Sandy Student

Student's Signature

Date

Parent's Signature - dependent students only

Date