

# SUNY Buffalo State



## A. Student Information

Banner ID B0012345 Name Sandys. Student  
123 Main St. Buffalo NY 14222  
Address (include apt. #) City State Zip Code  
01/01/1995 (555) 555-5555 (555) 111-1111  
Date of Birth Home Phone Number Student's Cell Phone Number

## 2015-2016 Verification Worksheet - Federal Student Aid Programs

Your application was selected for review in a process called "Verification." In this process, we are required to compare the information from your application with the information provided on this form and the requested tax forms. If there are differences between your application and the documents you've submitted, corrections may need to be made. **We cannot process your federal financial aid until verification has been completed, so please provide the required documents as soon as possible.**

### What you should do: (use 2014 tax forms)

1. Collect applicable financial documents listed at right →
2. Complete all sections, sign the worksheet (and parent if you are required to provide their income information on FAFSA).
3. Contact us with questions about completing this worksheet.
4. Bring or mail the completed worksheet, requested tax information, and other documents to our office (address below).

### Dependent Students:

- \*Parent(s) Federal Tax Return Transcript (if requested)
- \*Parent(s) W2's
- \*Student W2's (if they worked & did not file)
- \*Schedules C, E, & 1099R if applicable

### Independent Students/Spouse:

- \* Student/Spouse Federal Tax Return Transcript (if requested)
- \*Student/Spouse W2's
- \*Schedules C, E, & 1099R if applicable

## B. Family Information

**Dependent Students:** *List below the people in your parents' household to include:*

- (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, 2015 through June 30, 2016, 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, 2015 through June 30, 2016.
- (e) Also write in the name of the college for any family member, excluding your parents, who will be attending college, at least half-time between July 1, 2015 and June 30, 2016, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

**Independent Students:** *Follow instructions above with the exception of (b)&(c). Also include your spouse and any children.*

If a sibling listed below is 24 years of age or older, or if someone who fits category (d) "other people" is listed below please submit the VWOTH16 form that can be found at the following Web site: <http://www.buffalostate.edu/financialaid/x487.xml> or you may request one via email at [finaid@buffalostate.edu](mailto:finaid@buffalostate.edu).

Full Name	Age	Relationship	College
<i>Example: Missy Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
<i>Sandy Student</i>	<i>33</i>	<i>Self</i>	<i>Buffalo State</i>
<i>Jack Student</i>	<i>35</i>	<i>Husband</i>	<i>-</i>
<i>Sally Student</i>	<i>2 mo.</i>	<i>daughter</i>	<i>-</i>

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**C1. Tax Forms and Income Information in 2014.** Check one box in each section, as applicable.

<b>Dependent Student</b>
<input type="checkbox"/> I did not work. <input type="checkbox"/> I worked but did not file taxes. Submit your W-2 statements from 2014. <input type="checkbox"/> I filed a 2014 federal tax return. Do not submit.
<b>Parents of Dependent Students (parents listed on FAFSA)</b>
<input type="checkbox"/> My parents filed a 2014 federal tax return. Next steps: Submit a copy of their 2014 tax return <u>transcript</u> or use the IRS Data Retrieval Tool in the FAFSA. W-2 statements and/or Schedules C and E must also be submitted. <input type="checkbox"/> My parents worked but did not file a tax return. Next steps: Submit their W-2 statements from 2014. <input type="checkbox"/> My parents did not work in 2014. 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).
<b>Independent Student</b>
<input checked="" type="checkbox"/> I filed a 2014 federal tax return. Next steps: submit a copy of your 2014 federal tax return <u>transcript</u> or use the IRS Data Retrieval Tool in the FAFSA. If independent, you must also submit your W-2 statements and/or Schedules C and E. <input type="checkbox"/> I worked but did not file a tax return. Next steps: Submit your W-2 statements from 2014. <input type="checkbox"/> I did not work. Next steps: submit a written statement explaining how you supported yourself.
<b>Student's Spouse (if student is married today)</b>
<input checked="" type="checkbox"/> My spouse filed a 2014 federal tax return. Next steps: submit a copy of their 2014 tax return <u>transcript</u> or use the IRS data retrieval tool in the FAFSA. You must also submit your spouse's W-2 statements and/or Schedules C and E. <input type="checkbox"/> My spouse worked but did not file a tax return. Next steps: Submit their W-2 statements from 2014. <input type="checkbox"/> My spouse did not work. Next steps: Submit a written statement explaining how your spouse was supported in 2014.

- ✓ 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>.

**2. Calendar Year 2014** (be sure to list amounts for the full year)

Both tax filers and non-tax filers must list any untaxed income received in 2014.

	Student	Parent(s) (step-parent)
To prevent delays in processing be sure to <u>enter zeros below if no funds were received.</u>	Include SPOUSE If you are married	Of DEPENDENT students only
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children listed on the front of this form.	\$ 0	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. Attach related W2's to this form.	\$ 0	\$
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 and scholarship portions of fellowships and assistantships. Do not include financial aid received for the prior year.	\$ 0	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay. Combat pay is reported on the W-2 In Box 12, Code Q.	\$ 0	\$
Earnings from work under a cooperative education program offered by a college.	\$ 0	\$
Child support received for any of your children. Don't include foster care or adoption payments.	\$ 0	\$
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.	\$ 0	\$
Veterans' non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ 0	\$
Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ 0	XXXXXX
Other untaxed income not reported, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don't include extended foster care benefits, 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 plans), foreign income exclusion or credit for federal tax on special fuels. Source of income: <u>Disability - private, not SSD</u>	\$ 1200	\$

**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

3/3/15  
Date

\_\_\_\_\_  
Parent's Signature - dependent students only

\_\_\_\_\_  
Date