



2014-2015 Verification Worksheet

Federal Student Aid Programs – Buffalo State

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 submitted, we will make corrections t. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

What you should do: (use tax forms 2013)

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 Federal Tax Return Transcript (if requested)
- ✓ 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

A. Student Information

Last Name	First Name	M.I.	Banner ID (or SS#)	
Address (include apt. #)		City	State	Zip Code
Date of Birth	(____) _____ - _____ Home Phone Number	(____) _____ - _____ Student’s Cell Phone Number		

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)** include 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, 2014 through June 30, 2015, 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, 2014 through June 30, 2015.
 - (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, 2014 and June 30, 2015, 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 have your parent (or you if you are considered independent) submit the Other People in Household Form that can be printed from the following web site: financialaid.buffalostate.edu/forms or request one by email at finaid@buffalostate.edu

Full Name	Age	Relationship (to student)	College
<i>Example: Missy Jones</i>	<i>24</i>	<i>Self</i>	<i>City University</i>
		Self	Buffalo State

C1. Tax Forms and Income Information in 2013. Check one box in each section, as applicable.

Student
<input type="checkbox"/> I filed a 2013 federal tax return. Next steps: submit a copy of your 2013 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 2013. <input type="checkbox"/> I did not work. Next steps: If you are independent, submit a written statement explaining how you supported yourself.
Student's Spouse (if student is married today)
<input type="checkbox"/> My spouse filed a 2013 federal tax return. Next steps: submit a copy of their 2013 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 2013. <input type="checkbox"/> My spouse did not work. Next steps: Submit a written statement explaining how your spouse was supported in 2013.
Parents of Dependent Students (include parents listed on FAFSA)
<input type="checkbox"/> My parents filed a 2013 federal tax return. Next steps: Submit a copy of their 2013 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 2013. <input type="checkbox"/> My parents did not work in 2013. 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).

- ✓ **Obtain Tax Return Transcripts:** The IRS will mail you a copy of your tax return transcript or you may register on the IRS website and print your transcript immediately at www.irs.gov/Individuals/Get-Transcript. To order a w-2 or tax return transcript via paper, complete Form 4506-T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- ✓ **Obtain Duplicate W-2 Statements:** Contact your employer for a duplicate or request a "Wage and Income Transcript" at www.irs.gov/Individuals/Get-Transcript

C2. Untaxed Income Information. Required of ALL students and parents of dependent students.

Enter annual amounts received in 2013	Student	Parent(s)
DO NOT LEAVE BLANKS: Enter \$0 if no funds were received.	And spouse if married	And step-parent if remarried
Child support paid because of divorce or separation or as a result of a legal requirement. Do not include support for children listed 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. Attach related W2's to this form.	\$	\$
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 in prior year.	\$	\$
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.	\$	\$
Earnings from work under a cooperative education program offered by a college.	\$	\$
Child support received for any of your 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' 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.	\$	XXXXXXXXXX
Other untaxed income not reported, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040—line 67. Do not include student aid, income tax credits, welfare payments, untaxed Social Security benefits, SSI, SSD, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans) Source of income: _____	\$	\$

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.

Student's Signature

Date

Parent's Signature - dependent students only

Date