

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 information reported on the student's 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: Students that do not complete verification by the established deadline forfeit federal financial aid, including loans. 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 <http://financialaid.buffalostate.edu/verification>.

Steps to Complete Verification

1. Complete all sections of this form. Parent data is required for dependent students.
2. Collect the required tax documents for **2017**
3. based on the student's dependency status.
4. Submit this form and all required tax documents to our office. Include the student's Banner ID on all submissions. If submitting by email, please only submit pdf attachments.

Tax Forms: Dependent Students

- Student: Use Table 1 on page 2 to determine which tax documents you must submit.
- Parent(s): Use to Table 2 on page 2 to determine which documents you must submit.

Tax Forms: Independent Student

- Student: Use Table 3 on page 2 to determine which tax documents you must submit.
- Student's Spouse (if married): Use Table 4 on page 2 to determine which tax documents you must submit.

B. Family Information

Check the appropriate dependency status for the student and complete 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)**: If your biological (or adoptive) parents live together, include both parents. If your biological (or adoptive) parents are separated or divorced, include your custodial parent. If your custodial parent is remarried, include your step-parent. For all other scenarios, include the parent you live with. If you don't live with either parent, include the parent that has provided you the most support in the previous 12 months.
- (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, 2019 to June 30, 2020, or (2) the children would be required to include parent information on the FAFSA.
- (d) **other people** if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2019 through June 30, 2020.
- (e) If any household members will attend college at least half-time in a matriculated program between July 1, 2019 and June 30, 2020, write the name of the college he/she will attend in the space provided.

 Independent Students: *Follow instructions above except for items (b), (c), & (d).* Include your spouse, any children or other people if they live with you and you will provide more than half of their support from July 1, 2019 through June 30, 2020.

Full Name of Household Member	Age	Relationship to Student	College Name (if enrolled in 19-20)
		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.

SUBMIT ALL REQUIRED DOCUMENTS TO:

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

Banner ID: _____

C1. Tax Filing Status for 2017 and Required Tax Forms

Check the appropriate tax filing status and submit the required documentation listed. Dependent students and their parent(s) should complete Tables 1 and 2. Independent students should complete Table 3, and if married, Table 4.

Table 1: Dependent Student	
<input type="checkbox"/>	I did not work.
<input type="checkbox"/>	I worked, but I have not filed a federal tax return and I was not required to file. Submit your W-2 statements from 2017.
<input type="checkbox"/>	I filed a 2017 federal tax return. Submit a copy of your signed 2017 federal tax return or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules E, if filed.

Table 2: Parents of Dependent Students (parents listed on FAFSA and in household chart on page 1)	
<input type="checkbox"/>	My parents did not work in 2017. Your parent(s) must submit a written, detailed statement explaining how they supported their family with no income. Include supporting documents as applicable (e.g., SNAP statement, social security statement).
<input type="checkbox"/>	My parents worked, but did not file a tax return and were not required to file a tax return. Submit your parents' 2017 W-2 statements and request a tax return transcript from the IRS to confirm their non-filing status for 2017. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at https://financialaid.buffalostate.edu/forms .
<input type="checkbox"/>	My parents filed a 2017 federal tax return. Submit a copy of their signed 2017 tax return or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedule E, if filed.

Table 3: Independent Student	
<input type="checkbox"/>	I did not work. Submit a written, detailed statement explaining how you supported yourself with no income.
<input type="checkbox"/>	I worked but I have not filed taxes, and I am not required to file a tax return. Submit your 2017 W-2 statements and request a tax return transcript to confirm your non-filing status for 2017. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at https://financialaid.buffalostate.edu/forms .
<input type="checkbox"/>	I filed a 2017 federal tax return. Submit a copy of your signed 2017 federal tax return or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedule E, if filed.

Table 4: Independent Student's Spouse (if student is married today)	
<input type="checkbox"/>	My spouse did not work. Your spouse must submit a written statement explaining how he/she was supported in 2017.
<input type="checkbox"/>	My spouse worked but has not filed taxes, and was not required to file a tax return. Submit your spouse's 2017 W-2 statements and request a tax return transcript to confirm their non-filing status for 2017. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at https://financialaid.buffalostate.edu/forms .
<input type="checkbox"/>	My spouse filed a 2017 federal tax return. Submit a copy of your spouse's signed 2017 tax return or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit your spouse's Schedule E, if filed.

To request an IRS Tax Return Transcript to confirm your non-filing status (if required above), visit www.irs.gov/individuals/get-transcript and then select the option for the tax return transcript for the appropriate year.

C2. Other Income Received or Paid during 2017

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.**

Income Received or Paid during 2017	Student Include spouse if married	Parent(s) / step-parent of dependent students
Child support paid because of divorce or separation or legal requirement. Do not include 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. Submit related W2's.	\$	\$
Child support received for any of your children. Exclude 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). Don't 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.	\$	\$

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