

# 2008-2009 Verification Worksheet

## Federal Student Aid Programs

Your application was selected for review in a process called "verification." In this process, your school will be comparing information from your application with signed copies of your 2007 federal tax forms (and your spouse's if you are married, or parents' if you are considered dependent for federal aid purposes). The law says we must ask you for this information before awarding Federal aid. If there are differences between your application and supporting documents, corrections may need to be submitted. Try to complete verification as soon as possible, so that your financial aid won't be delayed. Your school must review the requested information, before any federal aid will be released to you.

**What you should do:**

1. Collect your (and your spouse's or parents') financial documents (signed Federal income tax forms, W-2, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. **Complete all sections and sign the worksheet** - you (and your parent if appropriate).
4. Take the completed worksheet, tax forms, and any other documents to your financial aid administrator.
5. Your financial aid administrator will compare information on these documents and make corrections if necessary.

### A. Student Information

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Social Security Number</i>
<i>Address (include apt. #)</i>			<i>Date of birth</i>
<i>City</i>	<i>State</i>	<i>Zip Code</i>	<i>Phone Number (include area code)</i>

### B. Family Information

- Independent Students:** List the people in your household; include (a) yourself, your spouse if married; (b) your children, if you provide more than half of their support from July 1, 2008 through June 30, 2009; and (c) any other people if they now live with you, and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2008 through June 30, 2009.
- Dependent Students:** List the people in your parent's household; include (a) yourself, your parent(s) you live with (include stepparent); (b) your parents' other children, even if they don't live with your parent(s), if ; (1) your parents provide more than half of their support from July 1, 2008 through June 30, 2009, or (2) if they would be required to give parental information when applying for Federal student aid; and (c) any other people if they now live with your parents, and your parents provided more than half of their support and will continue to provide more than half of their support from July 1, 2008 through June 30, 2009.

**Write the names of all household members.** Also write in the name of the college for any family member **excluding** your parent(s), who will be attending college at least half-time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
<i>Example: Martha Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	

## C. Tax Forms and Income Information

- All tax filers must submit a **signed** copy of all 2007 Federal Income Tax returns (includes the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return).

**Dependent students must submit their tax return as well as their parent's tax return:**

*If you did not keep a copy of your tax return, you must request a 2007 tax transcript from the Internal Revenue Service by calling 1-800-829-1040. When you call, you'll need to press 3 to access your personal tax records and then enter your social security number and press 1 to request your tax return transcript. You will also be prompted for your address. Tax transcripts are free.*

- Check the box for those people who did not and are not required to file a 2007 Federal Income Tax Return. List below the employer(s) and any income received in 2007 (use W-2 forms or other earning statements).

- You                       Your spouse                       Your father                       Your mother

Name of Employer	Student Amount	Spouse or Parent(s) Amount

- Both tax filers and non-tax filers must list any untaxed income received in 2007. **Be sure to enter zeros if no funds were received.** (See Worksheet A of the Free Application for Federal Student Aid)

Student (spouse)	Calendar Year 2007	Parent(s)
\$	Earned Income Credit and/or Additional child tax credit for tax year 2007	\$
\$	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) as reported on W-2 Form Box 13, codes D, E, F, G, H, and S. Include untaxed portions of 401(k) and 403(b) plans.	\$
\$	Child support received for all children. Don't include foster care.	\$
\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps.	\$
\$	Annual Social Security payments that were not taxed.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$
\$	Workers' Compensation	\$
\$	Veterans' non-education benefits, such as Death Pension or Dependency & Indemnity Compensation (DIC)	\$
\$	Any other untaxed income and benefits, such as VA Educational Work-Study allowances, untaxed portions of Railroad Retirement Benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, WIA benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$
\$	Cash or any money paid on your behalf, not reported elsewhere on this form.	\$ XXXXXXXX

## D. Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both

\_\_\_\_\_ Date \_\_\_\_\_  
Student's Signature

\_\_\_\_\_ Date \_\_\_\_\_  
Parent's Signature (Dependent Students Only)

Return to: West Virginia State University, P.O. Box 1000, Ferrell Hall, Room 324, Institute, WV 25112, (304)766-3131