

**For In-person inquiry, please visit Campus 411 MC 116**  
<http://www.csuohio.edu/financialaid/>

## 2008-2009 Verification Worksheet - Independent

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 (and your spouse's, if you are married) 2007 Federal Tax Forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

### What you should do

1. Collect your (and your spouse's) financial documents (signed federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have any questions about completing this worksheet.
3. Fill in and sign the worksheet.
4. Take the completed worksheet, tax forms, and any other documents your school needs to your financial aid administrator.
5. Your financial aid administrator will compare information on the documents. You may need to make corrections using your SAR, or electronically.

*Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668).*

### A. Student Information

\_\_\_\_\_  
Last name                      First Name                      M.I.

\_\_\_\_\_  
CSU ID Number

\_\_\_\_\_  
Address (include apt. #)

\_\_\_\_\_  
Date of birth

\_\_\_\_\_  
City                                      State                                      Zip

\_\_\_\_\_  
Phone number (include area code)

Student Email: \_\_\_\_\_

### B. Family Information

List the people in your household, including:

- Yourself, and your spouse if you have one, and
- Your children, if you will provide more than half of their support from July 1, 2008 through June 30, 2009, and
- Other people if they now live with you and you provide 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 household member who will be attending college at least half time between July 1, 2008 and June 30, 2009 and will be enrolled in a degree, diploma, or certification program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Martha Jones (example)	24	Wife	City University
		Self	

**C. Student's Tax Forms and Income Information (all applicants)**

**Independent**

1. Check one box only. Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a copy of an Internal Revenue Service form that lists tax account information.
- Check and attach signed tax return.
  - Check if you will not file and are not required to file a 2007 U.S. Income Tax Return. If you did not file and are not required to file a 2007 Federal Income Tax Return, list below your employer(s) and any income received in 2007 (use the W-2 form or other earnings statements if available).

2007 Employer(s)	2007 Wages/Salary
	\$
	\$
	\$

**D. Spouse's Tax Forms and Income Information (if student is married)**

1. Check one box only. Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a copy from the tax preparer or a copy of an Internal Revenue Service form that lists tax account information.
- Check if you and your spouse did or will file a joint return.
  - Check and attach signed tax return if you spouse filed a separate return.
  - Check if your spouse will not file and is not required to file a 2007 U.S. Income Tax Return. If your spouse did not file and is not required to file a 2007 federal income tax return, list below your spouse's employer(s) and any income received in 2007 (use the W-2 form or other earnings statements if available).

2007 Employer	2007 Wages/Salary
	\$
	\$
	\$

**E. Worksheets A, B, & C on FAFSA. Please use yearly amounts.**

Student Information	WORKSHEET A	Spouse Information
\$	Earned income credit from IRS Form 1040—line 66a; 1040A—line 40a; or 1040EZ—line 8a	\$
\$	Additional child tax credit from IRS Form 1040—line 68 or 1040A—line 41	\$
\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). <b>Do not</b> include food stamps or subsidized housing.	\$
\$	Social Security benefits received, that were not taxed (such as SSI), for all household members reported in question 90. Report benefits paid directly to student (or spouse) in the Student and/or Spouse column.	\$
\$	<b>Total</b>	\$

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Student Information	WORKSHEET B	Spouse Information
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including but not limited to, amounts reported on the W-2 Form in boxes 12a through 12d; codes D, E, F, G, H, and S.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	\$
\$	Child support <b>RECEIVED</b> for all children. <b>DO NOT</b> include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$
\$	Foreign income exclusion from IRS Form 2555—line 45 or 2555EZ—line 18.	\$
\$	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). <b>EXCLUDE</b> rollovers. If negative, enter a zero.	\$
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). <b>EXCLUDE</b> rollovers. If negative, enter a zero.	\$
\$	Credit for Federal tax on special fuels from IRS Form 4136-line 18 ( <b>non-farmers only</b> ).	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$
\$	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and /or VA Educational Work-Study allowances.	\$
\$	Other untaxed income not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI (FAFSA questions 35 and 79). Do not include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements (e.g., cafeteria plans).	\$
\$	Money received, or paid on your behalf, (e.g., bills) not reported elsewhere on this form.	\$
\$	<b>Total</b>	\$

Student Information	WORKSHEET C	Spouse Information
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 49 or 1040A—line 31.	\$
\$	Child Support paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household, as reported in question 90.	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	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 or scholarship portions of fellowships and assistantships.	\$
\$	<b>Total</b>	\$

## F. Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If married, spouse's signature is optional.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse Date