

2008 - 2009 Verification Worksheet

Federal Student Aid Programs

Your application was selected 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, or parent(s) if you are considered dependent for federal aid purposes) **2007 Federal Tax forms, W-2 forms** or other financial documents. The law says we have the right to ask you for this information before awarding Federal Aid. If there are differences between your application and your documents, corrections may need to be processed. Try to complete verification as soon as possible, so that your financial aid won't be delayed. Your school must review the requested information, under the financial aid programs rules (CFR 34, Part 668).

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. **Fill in the appropriate sections and sign the worksheet**— Dependent students require parental signatures.
4. Take the completed worksheet, photocopies of tax forms, and any other documents your school needs to your financial aid administrator.
5. Your financial aid administrator will compare information on these documents and make corrections if necessary.

A. Student Information

Last Name	First Name	M.I.	Student ID Number or SSN
Mailing Address (include apt. #)			____/____/____ Date of Birth
City	State	Zip Code	(____)_____ Phone (include area code)

B. Family Information (Check one of the following according to your FAFSA application)

Independent Students (refer to your SAR)

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
- 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 (refer to your SAR)

List the people in your parents' household include:

- A. Yourself, and your parent(s) (include stepparent) even if you don't live with your parents and;
- 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 and will continue to 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
- C. Any 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, 2008 through June 30, 2009.

Write the names of all household members in the space(s) below. List the name of the college for any family member (excluding parents of dependent students), 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 Attending
Example: Martha Jones	24	Wife	City University
		Self	

Child support **you paid** because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household, as reported in question 84 (or question 65 for your parents).

Student/Spouse amount _____ Parent amount _____

complete other side

C. Tax Forms and Income Information

TAX FILERS MUST SUBMIT A SIGNED COPY OF COMPLETE 2007 FEDERAL INCOME TAX RETURN (1040, 1040A, 1040EZ, 1040T, ETC.) WITH ALL ATTACHMENTS, INCLUDING ANY APPLICABLE SCHEDULES AND W2S.

- **Dependent** If both the parent(s) and student filed taxes, complete only **section E**. (**NOTE: All taxfilers must submit signed copies of their 2007 Federal Tax Return**)—If either the parent(s) or student is a non tax filer, complete **sections D and E**.
- **Independent Students** – If filing Taxes complete only section E. If you did not keep a copy of your tax return, you must request a copy of your 2007 taxes from your tax preparer or by calling the Internal Revenue Service at 1-800-829-1040 and following the prompts to request a **tax transcript** of your personal return. There is no charge to request tax transcripts, however there is a \$39.00 charge if you order exact copies with W-2's. You can request copies of W-2s from your employers or wage/earnings statements from State Employment Divisions if you did not keep a copy in your records. (**NOTE: All taxfilers must submit signed copies of their 2007 Federal Tax Return**). If a non tax filer, complete **sections D and E**.

Explain reason for not filing Federal Tax Return: _____

List your name if you (and your spouse, or parent(s) if you are a dependent student) will not file a 2007 tax return. **ATTACH COPIES OF W-2s AND ANY OTHER EARNING STATEMENT.**

Be sure to enter zeroes if no funds were received.

List all 2007 Income

Name of Non-Tax Filer	Source of Income (W-2 or earning statement)	Student/Spouse Amounts	Parent(s) Amounts
1.		.00	.00
2.		.00	.00
	Total:	.00	.00

1. Signature of Non-Tax Filer _____

Date _____

2. Signature of Non-Tax Filer _____

Date _____

E. Tax filers and non-tax filers must list and provide documentation of any untaxed income received in 2007.

Be sure to enter zeroes if no funds were received. Refer to Worksheets A and B of the FAFSA.

Source of Untaxed Income Received in 2007	Student/Spouse	Parent(s)
Welfare benefits (including TANF and childcare benefits paid to providers). Do not include Food Stamps.	\$	\$
Social Security benefits received that were not taxed.	\$	\$
Payments to tax-deferred pensions, savings plans, IRA, KEOGH (401k, 403b).	\$	\$
Child Support received.	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others.	\$	\$
Veterans non-education benefits (disability stipend, VA Educational Work-Study, BAS, BAQ, etc.)	\$	\$
Earned Income Credit and/or Additional Child Tax Credit	\$	\$
Any other untaxed income and benefits. <i>Description</i> _____	\$	\$

F. 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, sentenced to jail, or both.**

Student's Signature _____

Date _____

Parent's Signature (Dependent Students Only) _____

Date _____

Return completed form to: Umpqua Community College, Financial Aid Office—**Don't forget to include required tax forms.**