

## 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**) along with **W-2's and Schedules**. The law says we have the right to ask you for this information before awarding Federal Student Aid. Complete this form as soon as possible, so that your financial aid won't be delayed. **Your financial aid will not be processed until verification requirements are complete.** Your school must review the requested information, under the Financial Aid Program rules (34 CFR, Part 668).

<i>Student Last Name</i>	<i>Student First Name</i>	<i>MI</i>	<i>Banner ID</i>
<i>Email address</i>		<i>Date of Birth</i>	
<i>Permanent Address (include apt. #)</i>	<i>City</i>	<i>State</i>	<i>Zip code</i>
<i>Phone Number (include area code)</i>			

**What you should do:**

1. Collect your (and your spouse's or parents') financial documents (signed Federal income tax forms, 1040, 1040A, 1040EZ) along with W-2's and Schedules.
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. **Complete the "Student and Family Information" sections and sign the worksheet** - you (and your spouse or at least one parent).
4. Mail the completed worksheet, **tax forms** (along with W-2's and Schedules), and any other documents to the Student Financial Aid Office (SFAO) address located on the back of this worksheet.
5. Your financial aid administrator will compare information on these documents and make corrections if necessary. If there are differences between your application information and your financial documents, the SFAO will send corrections electronically to have your information reprocessed.

### STEP 1

**Please check the appropriate box.**

- Dependent Students:** List the people that your parents will support between July 1, 2008 through June 30, 2009. Include yourself (even if you do not live with your parent), your parents/step-parents, your parents' dependent children, (if your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2008 - June 30, 2009) and include other people if they now live with your parents and they will receive more than half of their support for the same period above.

Full Name	Age	Relationship	College
		<b>Self</b>	NC A&T State University

- Independent Students:** List the people that you (and your spouse) will support from July 1, 2008 through June 30, 2009. Include yourself, your spouse, and your dependent children (if you provide more than half of their support).

Full Name	Age	Relationship	College
		<b>Self</b>	NC A&T State University

## STEP 2

### Tax Forms and Income Information

1. All tax filers must submit **a signed copy** of the 2007 completed Federal Income Tax returns (1040, 1040A, 1040EZ) along with W-2's and all schedules. Please indicate below if you completed a 2007 Federal Tax return:

(Student)                       Your Spouse                       Your Parent(s)/Stepparent

*If you and/or your parent(s) did not keep a copy of your tax return, you must request form 1722 or RTFTP from the Internal Revenue Service by calling 1-800-829-1040.*

2. Check the box for those people who **will not** and **are not** required to file a 2007 Federal Income Tax Return. Both tax filers and non-tax filers must list any untaxed income (i.e. social security, child support) received in 2007 below. You must submit a copy of your W-2/1099 form if you had earnings and did not file federal taxes.

(Student)                       Your Spouse                       Your Father/Stepfather                       Your Mother/Stepmother

**(Please complete this section only if you/parent worked and did not or were not required to file taxes.)**

Name of Employer or Sources of Untaxed Income	Student Amount	Parent(s) or Spouse Amount
Source of Income:	\$	\$
Source of Income:	\$	\$
Source of Income:	\$	\$

## STEP 3

### Certification

By signing this worksheet, I (we) certify that all the information reported to qualify for Federal Student Aid is complete and correct. **(If married, spouse's signature is optional. If dependent, the student and at least one parent must sign.)**

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

\_\_\_\_\_  
Mother's/Step-mother's Signature                      Date                      Father's/Step-father's Signature                      Date

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

**Do not mail this worksheet to the Department of Education.**

**Make sure that federal tax returns are signed and include all schedules and W-2's**

**Mail or Fax completed form to:  
North Carolina A&T State University  
Student Financial Aid Office  
1601 E. Market Street, Room 100  
Greensboro, North Carolina 27411  
Fax #: (336) 334-7954**

**Student's Name** Name \_\_\_\_\_ **Banner ID Number** \_\_\_\_\_

**Student/Spouse**

**Parents**

**Worksheet A**

Report Annual Amounts

\$	Earned income credit from IRS Form 1040-line 66a; 1040 A-line 40a; 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). Do not 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 (or 66 for your parents). Report benefits paid to parents in the Parents column, and benefits paid directly to student (or spouse) in the Student/Spouse column.	\$
\$	<b>Yearly Total</b>	\$ <b>Yearly Total</b>

**Worksheet B**

Report Annual Amounts

\$	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 + 32 or 1040A-line 17.	\$
\$	Child support you <b>received</b> for all children. Don't 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). Exclude rollovers. If negative, enter a zero here.	\$
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Credit for federal tax on special fuels from IRS Form 4136-line 17 (nonfarmers only)	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$
\$	Veterans noneducation 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 adjusted gross income (Q35 and Q79).	\$
\$	Don't 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>Yearly Total</b>	\$ <b>Yearly Total</b>

**Worksheet C**

Report Annual Amounts

\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	\$
\$	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 90 (or question 66 for parents).	\$
\$	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 (or your parents') 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>Yearly Total</b>	\$ <b>Yearly Total</b>