



2013-2014 Verification Worksheet

Federal Student Aid Programs

Your student aid application was selected by the U. S. Department of Education for review. We are required by federal law to compare your application with information on this form and with your 2012 federal tax information. This includes spouse's information if you are married, or parents' information if you are considered dependent for federal aid purposes.

If any items have to be corrected, the Financial Aid Office here at Truman State University will send changes in to the Central Processing System electronically. You will receive a new SAR, which allows you to see the changes and results.

Until verification is complete federal aid awards cannot be paid. The final deadline is April 1, 2014, or prior to withdrawal from school. (For Pell Grant only, the deadline will be given in the Federal Register or will be within 120 days after the last day of enrollment, whichever is earlier.)

What you should do:

1. Complete and sign this Verification Worksheet.
2. Attach copies of 2012 federal tax return **transcripts** (for student/spouse if independent, or for student/parents if dependent on your application).
Copies of Federal Tax Returns are NOT acceptable.
3. Don't skip sections; put N/A or "0" if it doesn't apply.
4. Send all forms at the same time to the Financial Aid Office, Truman State University, MC103, Kirksville, MO 63501
5. Provide documents as soon as you can—by June 1 if you expect aid to be ready when classes begin, Aug. 22, 2013.
6. Pay deposits and pre-enroll when scheduled, because verifications for enrolled students are done first.
8. Respond promptly to requests for additional information.

A. Student Information

Last Name	First Name	M.I.	Social Security Number	Student ID#
Address (include Apartment Number)			Date of Birth	
City	State	ZIP	Phone Number (include area code)	

*** By completing the email blanks below, you are authorizing the Truman State University Financial Aid Office to communicate through email if any additional information is required for verification. Please DO NOT provide email addresses if you do not check your email account regularly.***

Student Email address	Email Address for Parent (whose information is provided on FAFSA)
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B. Family Information

Dependent Student:

In the chart below include:

- Yourself
- Your parent(s) (Including step-parent) Do not include your non-custodial parent
- Your parent(s)' other dependent children if your parent(s) will provide more than half of their support from July 1, 2013 through June 30, 2014
- Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2013 through June 30, 2014.

Independent Student:

In the chart below include:

- Yourself
- Your spouse (if applicable)
- Your children if you will provide more than half of their support from July 1 2013 through June 30, 2014.
- Other people only if they now live with you and you will provide more than half of their support from July 1, 2013 through June 30, 2014.

Also write in the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a post-secondary educational institution any time between July 1, 2013 and June 30, 2014. Do not list high school students participating in dual credit courses as being in college. If you need more space, attach a separate page with the student's name and Student ID number at the top.

Full Name	Age	Relationship	College 2013-2014
		Self	Truman State University

C. Student (and Spouse, if applicable) Income InformationPlease check the box that applies (Check Only One):

- ☐ The student (and spouse if applicable) filed/will file a 2012 Federal IRS Tax Return. All tax filers must provide a 2012 Tax Return Transcript from the IRS. **Please note that tax transcripts are not the same as copies of tax returns.** Please refer to the last page of this worksheet for additional instructions on requesting a tax transcript.
- ☐ The student (and spouse if applicable) was not employed, did not have income and is not required to file a 2012 Federal IRS Tax Return.
- ☐ The student (and spouse if applicable) was employed in 2012, but did not/was not required to file a 2012 Federal IRS Tax Return. Please complete the table below.

THIS SECTION IS ONLY FOR NON-TAX FILERS

Source of Income	2012 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	☐ Yes ☐ No
	\$	☐ Yes ☐ No
	\$	☐ Yes ☐ No

*Non-Tax Filers with 2012 earnings are federally required to submit a W-2 from each employer. *If you were not issued a W-2 from your employer, please provide a written statement explaining why not, along with any other documentation you may have been issued (i.e. 1099 misc). Replacement copies of your W-2's can be obtained both from your employer and by contacting the IRS at 1-800-829-1040 and asking for a Wage and Income Transcript.*

D. Parent Income Information

Note: If two parents were reported in section B of this worksheet, the instructions and certifications below refer and apply to both parents. This section does not apply to independent students.

Please check the box that applies (Check Only One):

- ☐ The parent(s) filed/will file a 2012 Federal IRS Tax Return. All tax filers must provide a 2012 Tax Return Transcript from the IRS. **Please note that tax transcripts are not the same as copies of tax returns.** Please refer to the last page of this worksheet for additional instructions on requesting a tax transcript.
- ☐ The parent(s) was not employed, did not have income and is not required to file a 2012 Federal IRS Tax Return.
- ☐ The parent(s) was employed in 2012, but did not/was not required to file a 2012 Federal IRS Tax Return. Please complete the table below.

THIS SECTION IS ONLY FOR NON-TAX FILERS

Source of Income	2012 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	☐ Yes ☐ No
	\$	☐ Yes ☐ No
	\$	☐ Yes ☐ No
	\$	☐ Yes ☐ No

*Non-Tax Filers with 2012 earnings are federally required to submit a W-2 from each employer. *If you were not issued a W-2 from your employer, please provide a written statement explaining why not, along with any other documentation you may have been issued (i.e. 1099 misc). Replacement copies of your W-2's can be obtained both from your employer and by contacting the IRS at 1-800-829-1040 and asking for a Wage and Income Transcript.*

Student's Name _____ SSN or ID#: _____

E. Child Support Paid

Did the student (or the student's spouse if independent) or the student's parent/stepparent listed in Section B of this worksheet pay child support during 2012?

☐ Yes (If yes, you must complete the chart below)

☐ No

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2012

F. Supplemental Nutrition Assistance Program SNAP

Did anyone listed in your household in Section B of this worksheet receive benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) at any time during the 2011 or 2012 calendar years?

☐ Yes

☐ No

G. Sign and Date This Worksheet

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

Student's Signature

Date

Parent's Signature (Dependent Students Only)

Date



Please do not submit W-2 forms for 2012 tax filers unless they are requested from our office.
Non-tax filers are still required to submit all W-2 forms.

RETURN THIS WORKSHEET BY MAIL, EMAIL, OR FAX TO:

Truman State University
Financial Aid Office MC 103
100 E. Normal, Kirksville MO 63501
E-Mail: finaid@truman.edu
Fax: 660-785-7389

Requesting A Tax Transcript

On The Web—Go to www.irs.gov and click on the “Order a Return or Account Transcript” link.

By Phone—Call 1-800-908-9946

In Person—Most IRS local offices can issue you a tax transcript on the spot. To find an office in your area, go to www.irs.gov/uac/Contact-Your-Local-IRS-Office-1 and select your state.

- The following information is needed to request a transcript—Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2012 tax return was filed).
- It takes up to 2 weeks for IRS income information to be available for electronic IRS tax return filers, and up to 8-12 weeks for paper IRS tax return filers.
- Be sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript”.
- We strongly recommend that you have the transcript sent to you and then you submit a copy to our office, and keep a copy for your own records.
- Be sure to submit all pages of the transcript.

What To Do If You Have Trouble Obtaining A Transcript

When did you submit your 2012 return? It can take up to 8-12 weeks after filing your return before transcript information is available.

For more assistance in obtaining a transcript, either go to your local IRS office, or call 1-800-829-1040 to speak with an IRS representative.

Verification Requirements For Individuals Filing An Amended Return

For individuals who have filed an amended return, additional information is needed for verification purposes. Please note, the IRS Tax Return Transcript only shows the information submitted on the original return and does not reflect changes made by the amendment. Therefore the following items are required:

- 2012 Tax Return Transcript
- 2012 Tax Account Transcript
- A copy of the individual’s 1040X—Amended Return

IRS Data Retrieval

- For individuals who used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer unchanged 2012 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making corrections to the FAFSA, the Financial Aid Office will use this information instead of a tax transcript. Please note, in some instances, a transcript may still be needed.
- If you have not yet used the IRS Data Retrieval Tool, but will use it to transfer 2012 IRS income information into the student’s FAFSA instead of requesting a Tax Return Transcript, please notify the Financial Aid Office once the FAFSA has been successfully updated with the IRS data.

IRS Tax Extensions

If you or your parent has been granted an extension of time for completing a 2012 Tax Return, and you do not expect the return to be filed in time for the completion of your verification, please contact the Financial Aid office for additional information.