



## 2008-2009 Financial Aid Verification (INDEPENDENT Student Instructions and Form)

### What is verification and why was I selected?

Verification is the process used to check the accuracy of the information provided by a student/spouse on the Free Application for Federal Student Aid (FAFSA). Selection for verification is determined by the information submitted on your FAFSA. This process, mandated by the U.S. Department of Education, requires selected applicants to submit a verification form **and** copies of student/spouse 2007 Federal Income Tax Returns and other documents to the Office of Scholarships and Financial Aid.

Selection for verification does not mean that we think your information is incorrect. The verification process can take some time to complete, so we encourage you to respond promptly and accurately to any requests for information from our office.

### What do I need to provide to you if I'm selected?

You **must** submit the following to complete verification (**documents with incomplete data and/or missing signatures will be returned**):

- A completed 2008-2009 Independent Verification Worksheet, signed by the student.
- A **signed** copy of student's, **and** spouse's if married, **2007 Federal Income Tax Return**. If you are married and filed a joint tax return, submit the joint return; if you filed separate returns, submit each individual return.
- A statement on the Verification Worksheet indicating that a tax return was not filed is acceptable only if you/your spouse was not required by law to file; *otherwise, a return must be submitted*. To determine if a tax return is required, go to the IRS website at [www.irs.gov/publications](http://www.irs.gov/publications) and select *Publication 501 (2007), Exemptions, Standard Deduction, and Filing Information*. (pages 2-3) or call the IRS at 1-800-829-1040.

### What happens once you have my information?

Once you submit an accurately completed Verification Worksheet and **signed** tax documents, we will compare that information to the answers you gave on your 2008-2009 FAFSA. If the verification information does not match your FAFSA, we may require additional information to resolve the discrepancy. In some cases, we must submit the changes we make to the U.S. Department of Education (FAFSA processor); at that time, you will receive communication from our office and a Student Aid Report from the FAFSA processor. Once your eligibility for financial aid has been determined, you will receive notification via email with instructions on how to view and accept/decline your awards on SIS-Web.

### What happens if I don't provide you with the requested information?

When you signed the FAFSA (either by signing the paper FAFSA or by using your PIN on the web), you agreed, if asked, "to provide information that will verify the accuracy of your completed form." **We cannot determine aid eligibility or disburse funds until all requested documents are received and reviewed.**

### Will my information remain private?

The information you provide on the FAFSA and documents submitted to the OSU Office of Scholarships and Financial Aid is used to determine your eligibility for federal student financial aid. Sections 483 and 484 of the Higher Education Act of 1965, as amended, give us the authority to ask you, and your spouse if you are married, questions related to your financial aid eligibility and to request and collect the Social Security Number (SSN) of you and your spouse.

All information submitted for the purpose of securing financial aid is protected under OSU policy, the Federal Educational Rights and Privacy Act of 1974 (FERPA), and the Gramm-Leach Bliley Act of 1999 (GLB). Under these provisions, OSU ensures the privacy and safeguarding of all financial aid information. Details of the OSU policies can be found in the OSU Catalog, available on the web at <http://www.okstate.edu/registrar>.

(continued on next page)

## Hints for Copying/Submitting Federal Income Tax Documents

In all cases, a signed photocopy of the original federal return (schedules and W-2s are not required) that was filed with the IRS is acceptable (please do not submit state tax returns). Failure to submit complete information will cause delays in the determination of your aid eligibility.

If requested, a return must be submitted unless the person was not required by law to file; in this case only, the statement on the Verification Worksheet that the person did not file a federal income tax return is acceptable. To determine if a tax return is required, go to the IRS website at [www.irs.gov/publications](http://www.irs.gov/publications) and select *Publication 501 (2007), Exemptions, Standard Deduction, and Filing Information*. (pages 2-3) or call the IRS at 1-800-829-1040.

**Making Copies:** Please be sure that copies of all pages of tax returns are clear:

- Be sure the first page of the return is not obscured by W-2s when you make copies.
- If the return is printed front/back, be sure to copy both sides of the page.
- Do not submit copies of state tax returns.
- Tax schedules and W-2s are not generally required for verification.
- Check the copies to be sure all figures are legible.
- While the names and Social Security Numbers that appear on the return need to be legible, we encourage you to block out the bank routing and account number listed in the “Refund” section of the return if you opted for direct deposit of a refund.

**Signatures:** Returns must be signed by the filer(s) or the preparer (the preparer’s name—not just the name of the company—can be stamped, typed, signed, or printed as long as the preparer’s SSN, EIN or PTIN are provided). Either an original or photocopied signature is acceptable. If a joint return has been filed, one signature is sufficient.

**E-Filers:** If an electronic return was filed, a **signed** copy of the "1040 PC Format" is acceptable. The Form 8453 "Declaration for Electronic Filing" alone is NOT acceptable. If the electronic return was completed by a paid tax preparer, you can obtain a copy of the 1040 PC from the preparer.

**Missing Tax Return:** If you cannot locate your federal income tax return, an official “IRS Transcript of Tax Return” is acceptable, but **it must be signed by the taxpayer**. Contact the IRS at 1-800-829-1040 to request the official transcript.

**Tax Filing Extensions:** An extension from IRS does not waive the requirement that we must have a tax return for verification of federal aid. Once we receive the completed return (and all other required documents), we will proceed with verification and determination of award eligibility.

### OSU Office of Scholarships and Financial Aid

119 Student Union

Stillwater, OK 74078-5061

Email: [finaid@okstate.edu](mailto:finaid@okstate.edu)

Phone: (405) 744-6604

[www.okstate.edu/finaid](http://www.okstate.edu/finaid)

**FAX#: (405) 744-6438**

(If you fax this form, please don't mail it)



**2008-2009  
Independent Student Verification Worksheet**

**IVW09**

*Please Use Black or Blue Ink*

OSU CWID (8-digits) or SSN (9 digits)  
(No Spaces)

<b>Student Name:</b>	<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> </tr> </table>								
<b>Address</b> (include apartment number):	<b>Date of Birth:</b>								
<b>City, State, Zip Code:</b>	<b>Phone Number:</b> (     )								

Your application was selected for review, or "verification" (for more information about this process and what it requires of you, please read the "2008-2009 Financial Aid Verification" sheet). Please complete this worksheet, include all requested documentation and sign the form. Answer all questions; if the answer is zero, write "0." **Incomplete worksheets will be returned to you. We cannot determine aid eligibility or disburse funds until all requested documents are received and reviewed.**

<b>Student/Spouse Income Information</b>	
<b>1. Did or will you (and your spouse, if married) file a Federal Income Tax Return for 2007?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>2a. If you answered YES:</b> include a clear copy of your <i>signed</i> student/spouse 2007 Federal Income Tax Return (don't submit state returns). The 2008-2009 Financial Aid Verification sheet explains how to obtain tax copies.	
<b>2b. If you answered NO:</b> check the appropriate box and, if applicable, include required document(s):	
<input type="checkbox"/> I/We did NOT earn money in 2007. <input type="checkbox"/> I/We earned money, but were not required to file a 2007 Federal income tax return. <b>List below your employer(s)</b> and any income received in 2007 (use the W-2 form or other earnings statements if available).	
<b>Name of Student's/Spouse's Employer(s) (if you checked items in 2b above)</b>	<b>Amount(s) Earned</b>
	\$
	\$
	\$

<b>Student/Spouse Worksheet B (Calendar Year 2007)</b>	<b>Student/Spouse</b>
1. Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a-12d, codes D, E, F, G, H, and S.	\$            /yr
2. <b>Child Support received for all children</b> (total 2007 amount). <i>Don't include foster care or adoption payments.</i>	\$            /yr
3. Foreign income exclusion from IRS Form 2555-line 45 or Form 2555 EZ-line 18.	\$            /yr
4. Credit for federal tax on special fuels from IRS Form 4136-line 18 (non-farmers only)	\$            /yr
5. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$            /yr
6. Veterans non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$            /yr
7. Untaxed portions of Worker's Compensation and/or Disability.	\$            /yr
8. Any other untaxed income or benefit, such as untaxed portions of railroad retirement benefits, Black Lung Benefits, etc. <b>Tax filers only:</b> report untaxed combat pay. <b>Don't include:</b> student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements (e.g., cafeteria plans), Social Security Benefits received, TANF or food stamps.	\$            /yr
9. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on the FAFSA.	\$            /yr

<b>Certification/Signature:</b>	
By signing this form, I (we) certify that all the information reported to qualify for federal student aid is complete and correct. <b>If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.</b>	
_____ <b>Student Signature</b>	_____ <b>Date</b>

**Return this form and any required documents to the address listed on the next page.  
No determination of aid eligibility or disbursement of funds can be made until all documents are received.**

**Return completed form and required documents to:**

OSU Office of Scholarships and Financial Aid  
119 Student Union  
Stillwater, OK 74078-5061  
Email: [finaid@okstate.edu](mailto:finaid@okstate.edu)  
Phone: (405) 744-6604  
[www.okstate.edu/finaid](http://www.okstate.edu/finaid)

**FAX#: (405) 744-6438**

(If you fax this form, please don't mail it)

**Did You Remember To:**

- Answer all questions? (Don't leave questions blank.)
- Sign the Verification Worksheet?
- Sign and date Federal Income Tax Returns?
- Check to be sure the copies of tax returns are legible?
- Write the student's Campus-Wide ID (CWID) or Social Security Number on all documents?