



## 2006-2007 Financial Aid Quality Assurance Verification (Instructions and Form—Independent Student)

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

Verification is the process used to check the accuracy of the information provided by a student/family 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 federal income tax returns, W-2s and other documents to the Office of Scholarships and Financial Aid.

Selection for verification does not mean that we think your information is incorrect. Some applications are selected randomly; others are selected based on common edits that check FAFSA data for consistency and logic. 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. **No determination of aid eligibility or disbursement of funds can be made until the verification process has been completed.**

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

You **must** submit the following to complete Verification:

- A completed and signed 2006–2007 Quality Assurance Verification Worksheet for Independent Students. **If an answer is zero, please write zero, do not leave the item blank.**
- A **signed** copy of **student's (and spouse's, if married) 2005 Federal Income Tax Returns**, and **all W-2s** (do not submit tax schedules or state tax returns).
- A statement on the Verification Worksheet indicating that a federal tax return was not filed is acceptable only if the student/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 <http://www.irs.gov/pub/irs-pdf/p501.pdf>. (pages 2-3).
- **Documents with incomplete data and/or missing signatures will be returned.**

### What happens once you have my information?

Once you submit an accurately completed Quality Assurance Verification Worksheet and **signed** tax documents (including W-2s), we will compare that information to the answers you gave on your 2006-2007 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. We will also send an award letter to you by U.S. mail. You can accept your awards online via SIS-Web or return the paper award letter to us.

### 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.**

(continued on next page)

## Hints for Copying/Submitting Federal Income Tax Documents

In all cases, a signed photocopy of the original federal return that was filed with the IRS is acceptable (do not submit tax schedules or state tax returns). **Please include copies of all W-2s**; 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 Quality Assurance Verification Worksheet that the person did not file a federal income tax return is acceptable. Contact the IRS at 1-800-829-1040 or [www.irs.gov](http://www.irs.gov), if you have questions about your filing status. **If a 2005 Federal Income Tax Return was not and will not be filed, we still need copies of all W-2s issued by employers.**

**Making Copies:** Please be sure that copies of all pages of tax returns and W-2s 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.
- Tax schedules are not required for verification.
- Do not submit copies of state tax returns.
- Check the copies to be sure all figures are legible on both the return and on W-2s.
- 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 or W-2s:** 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.

## 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 questions related to your financial aid eligibility and to request and collect your (and your spouse's, if married) Social Security Number.

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 2000 (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>.

### OSU Office of Scholarships and Financial Aid

119 Student Union, Stillwater, OK 74078-5061

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

FAX: (405) 744-6438

Phone: (405) 744-6604

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



2006-2007  
Quality Assurance Verification Worksheet  
**Independent Student**



<b>Student Name:</b>		<b>Social Security Number:</b> (9 digits with no spaces)	
<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 in a process called "verification." For more information about this process and what it requires of you, please review the "Quality Assurance Verification" information sheet. Please complete this worksheet, attach all requested documentation and sign the form. Answer all questions; if the answer is zero, write "0;" **incomplete worksheets will be returned. We cannot determine aid eligibility or disburse funds until all requested documents are received and reviewed.**

**Student/Spouse Income Information**

1. Did or will you (and your spouse, if married) file a Federal Income Tax Return for 2005?  Yes  No

2a. If you answered YES, attach a clear copy of:

- Student's/Spouse's signed Federal Income Tax Return (don't submit tax schedules or state returns) for the 2005 tax year; **AND,**
- Student's/Spouse's W-2 Wage Forms for the 2005 tax year.

Read the 2006-2007 Quality Assurance Verification information sheet to find out how to obtain copies of tax documents.

2b. If you answered NO: check the appropriate box and, if applicable, include required document(s):

- I/We did receive W-2 Wage Form(s) (attach a clear copy of W-2 Wage Form(s) for the 2005 tax year).
- I/We did NOT receive W-2 Wage Form(s) (list employers and the amount of money earned from each).
- I/We did NOT earn money in 2005.

Name of Student's/Spouse's Employer(s)	Amount(s) Earned
	\$
	\$
	\$
	\$

**Household Size/Number in College Information**

Please provide the following information about the people you (and your spouse, if married) will support between July 1, 2006 and June 30, 2007. Include:

- **Yourself**, (and your spouse, if you are married);
- **Your children**; if you will provide more than half of their support from July 1, 2006 through June 30, 2007;
- **Include other people if they now live with you**, and you provide more than half of their support and will continue to do so from July 1, 2006 through June 30, 2007.

Write the names of all family members who meet the criteria above, *whether or not they are in college*. Also write in the name of the college for any family member who will be attending college at least half-time between July 1, 2006 and June 30, 2007, and will be enrolled in a degree or certificate program. If you need more space, attach a separate sheet of paper.

Full Name	Age	Relationship	College Attended During 2006-2007
		Student	Oklahoma State University

(Form continued on next page)

**No determination of aid eligibility or disbursement of funds can be made until all documents are received and reviewed.**

OSU Office of Scholarships and Financial Aid  
 Quality Assurance Verification Worksheet  
 Independent Student, Page 2

Student Name \_\_\_\_\_

Student Social Security Number \_\_\_\_\_

Student/Spouse Worksheet (Calendar Year 2005)	Student/Spouse
1. Welfare benefits, including TANF. <i>Don't include food stamps.</i>	\$ /yr
2. Social Security Benefits received that were not taxed. <i>Attach copy of 2005 Form-1099 for all family members.</i>	\$ /yr
3. Child Support <b>received</b> for all children (total 2005 amount). <i>Don't include foster care or adoption payments.</i>	\$ /yr
4. Foreign income exclusion from IRS Form 2555-line 43 or Form 2555EZ-line 18.	\$ /yr
5. Credit for federal tax on special fuels from IRS Form 4136-line 15 (non-farmers only)	\$ /yr
6. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$ /yr
7. Veterans non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ /yr
8. Untaxed portions of Worker's Compensation and/or Disability.	\$ /yr
9. Any other untaxed income or benefit not reported elsewhere on the FAFSA, such as untaxed portions of railroad retirement benefits, Black Lung Benefits, etc. <b>Don't include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.</b>	\$ /yr
10. Money <b>received</b> , or paid on your behalf (e.g., bills), not reported elsewhere on the FAFSA.	\$ /yr
11. Child Support you <b>paid</b> because of divorce or separation (total 2005 amount). <b>Don't include support for children in your household.</b>	\$ /yr
12. Taxable earnings from Federal Work-Study or other need based work programs.	\$ /yr
13. Student grant, scholarship, and fellowship aid, including AmeriCorps awards, <b>only if it was reported to the IRS</b> in your adjusted gross income.	\$ /yr

**Certification/Signature:**

By signing this form, we certify that all the information reported to qualify for federal student aid is complete and correct. **If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
 Student

\_\_\_\_\_  
 Date

**Did You Remember To:**

- Answer all questions? (Don't leave questions blank.)
- Sign and date all Federal Income Tax Returns?
- Include copies of all W-2 Wage Forms?
- Check to be sure the copies of tax returns and W-2s are legible?
- Write the student's Social Security Number on all enclosed documents?

**Return 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)

**No determination of aid eligibility or disbursement of funds can be made until all documents are received.**