



2008-2009 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 student (and spouse, if married) 2007 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. 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 Quality Assurance Verification Worksheet for Independent Students, signed by the student.
- A **signed** copy of **student's (and spouse's if married) 2007 Federal Income Tax Return and all W-2s** (do not submit tax schedules or state tax returns). A statement on the Verification Worksheet indicating that the student did not file a federal income tax return is acceptable only if s/he 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 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 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 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. To determine if a tax return is required, go to the IRS website at 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.

If a 2007 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: 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

FAX: (405) 744-6438

Phone: (405) 744-6604

Web: www.okstate.edu/finaid



2008-2009

**Quality Assurance Verification Worksheet
Independent Student**

QAIV9

Please Use Black or Blue Ink

OSU CWID (8-digits) or SSN (9 digits) (No Spaces)			
Date of Birth:		Phone Number: ()	

Student Name:
Address (include apartment number):
City, State, Zip Code:

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 2007? 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 2007 tax year; **AND,**
- **Student's/Spouse's W-2 Wage Forms** for the 2007 tax year.

Read the 2008-2009 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 2007 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 2007.

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, 2008 and June 30, 2009. Include:

- **Yourself**, (and your spouse, if you are married);
- **Your children**; if you will provide more than half of their support from July 1, 2008 through June 30, 2009;
- **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, 2008 through June 30, 2009.

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, 2008 and June 30, 2009, 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 to Student	If in college during 2008-2009, list name of college attended.
		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's CWID or SSN _____

Student/Spouse Worksheet (Calendar Year 2007)	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 2007 Form-1099 for all family members.</i>	\$ /yr
3. Child Support received for all children (total 2007 amount). <i>Don't include foster care or adoption payments.</i>	\$ /yr
4. Foreign income exclusion from IRS Form 2555-line 45 or Form 2555EZ-line 18.	\$ /yr
5. Credit for federal tax on special fuels from IRS Form 4136-line 18 (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. Tax filers only: Report untaxed combat pay. Don't include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$ /yr
10. Money received , or paid on your behalf (e.g., bills), not reported elsewhere on the FAFSA.	\$ /yr
11. Child Support you paid because of divorce or separation (total 2007 amount). Don't include support for children in your household.	\$ /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, only if it was reported to the IRS 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 Campus-Wide ID (CWID) or SSN on all enclosed documents?

Return to:

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