Independent
2015-2016 Verification Worksheet
Federal Student Aid Programs

U.S. Department of Education

UNIVERSITY OF Cincinnati

Your application was selected for review in a process called verification. The law says that, before awarding federal aid, we have the right to ask you to confirm information reported on your Free Application for Federal Student Aid (FAFSA) using this worksheet and other required documents. If there are differences, your FAFSA information will be corrected.

You must complete and sign this worksheet.

> *Non-scholarship aid will not be available until the verification process as outlined on this worksheet is complete. Preliminary Awards are* <u>estimates</u> *of eligibility. Any delay can cause the loss of eligibility for limited aid sources. Failure to complete verification prior to last day of enrollment can result in total loss of eligibility.*

Authority to request and review information is provided under the financial aid program rules (34 CFR, Part 668).

More info: **www.financialaid.uc.edu/verification2016**

NOTICE ABOUT
INCOME VERIFICATION

Income information for tax filers must be matched with data on file with the Internal Revenue Service (IRS). See page 2.

As such, persons who have not filed their 2014 taxes* will not be able to complete verification until they have filed and their tax information is available from the IRS.

Availability of information for online IRS Data Retrieval or IRS Tax Return Transcripts can take up to 2 weeks of filing taxes electronically and up to 8 weeks following paper tax filing.

*Persons filing a tax deadline extension will have to complete the verification process now and again after filing taxes.

A. Student Information

Check one: ☐ **Incoming Freshman or Transfer Student**   ☐ **Continuing or Graduate/Law Student**

Last Name First Name M.I.	Social Security Number
Address (include apt. no.)	Date of Birth
City State ZIP Code	Phone Number (include area code)

B. Family Information

List the people in your household. Include:
- Yourself.
- Your spouse, if you are married.
- Your children, if any, if (a) you will provide more than half of their support from July 1, 2015, through June 30, 2016, or (b) the child would be required to provide your information if they were completing a FAFSA for 2015-2016. Include children who meet either of these standards even if they do not live with you.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2016.

Write the names of all household members. Also write in the name of the college for any household member who will be attending college at least half-time between July 1, 2015, and June 30, 2016, and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship	College	Will be enrolled at least half-time?
Martin Jones (example)	28	Husband	Central University	Yes
		Self	University of Cincinnati	

Important Income Information for Tax Filers

IRS DATA RETRIEVAL: Best way to verify income because UC is updated with how you used the IRS Data Retrieval Tool within FAFSA on the Web.
- Go to *www.FAFSA.gov*, log into the FAFSA record, select "Make FAFSA Corrections," and navigate to the financial section.
- If eligible to complete the process, use the IRS Data Retrieval to transfer 2014 IRS income tax information to the FAFSA.
- When using IRS Data Retrieval, do not modify income after transferring it to the FAFSA. If modified, Transcript option will be required.

IRS TAX RETURN TRANSCRIPT: If you are unable or choose not to use the IRS Data Retrieval Tool, an IRS Tax Return Transcript will be required.
- Go to *www.IRS.gov* and use the "Order a Return or Account Transcript" link or call 1-800-908-9946.
- Make sure to request a *Return* Transcript, not an *Account* Transcript.
- SSN, date of birth, and address used on the taxes needed for each tax filer when making the request. IRS will only send transcripts to address on file.
- Married persons filing separate tax returns (or newly single who filed jointly) must use Transcript option to request tax info for both persons.
- Original (not photocopy) of transcripts must be submitted with this verification worksheet.

C. Student's (and Spouse's, if married) Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page and check appropiate boxes.
   - ☐ IRS Data Retrieval in FAFSA on the Web was used to retrieve and transfer IRS income information for the student (and spouse, if married and filed jointly) either on the initial FAFSA or when making a correction and no modification of the income data has since been made.
   - ☐ Student unable or chooses not to use the IRS Data Retrieval Tool so original 2014 IRS tax return transcript(s, if married, filed separately) attached.
   - ☐ Student filed an amended return so originals of the 2014 IRS tax transcript or signed copy of tax return *and* 2014 signed copy of 1040X are attached.
   - ☐ Spouse filed separately and filed an amended return so originals of the 2014 IRS tax return transcript and 2014 1040X are attached.
   - ☐ Student attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below.
   - ☐ Spouse filing separately attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below.
   - (*Extension filing will require completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to UC.*)

2. **TAX RETURN NON-FILERS:** Complete this section if student (or spouse, if married) will not file and is <u>not required</u> to file a 2014 income tax return with the IRS.

	Employer's Name	2014 Income	W-2 Attached?
☐ Student (or ☐ spouse) not employed and had no income earned from work in 2014.		$	
		$	
☐ Student (or ☐ spouse) employed and completed info. Every employer, even if they didn't issue a W-2, must be listed, and W-2s must be provided if issued.		$	
		$	
		$	
		$	

D. Certification and Signature

By signing this worksheet, I certify that all the information reported on it is complete and correct. If married, spouse's signature is optional.

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

_____
Student   Date

_____
Spouse   Date

**Do not mail this worksheet to the U.S. Department of Education.
Mail, fax or take it to the University of Cincinnati.
You should make a copy of this worksheet for your records.**

**Student Financial Aid Office
University of Cincinnati
PO Box 210125
Cincinnati, OH 45221-0125**

**One Stop Student Services   Fax
220 University Pavilion   (513) 556-9171**

VERIFICATION PROCESS

AID PROCESSING CANNOT CONTINUE UNTIL PAPERWORK IS SUBMITTED.

selection and submission

- A percentage of all aid applicants are selected for federal verification. It is a generalized quality assurance program and does not reflect a specific concern with your aid application.

- Students selected for income verification must complete the income verification worksheet and return it along with required documents.

- Because tax information must be verified with IRS information on file, completion of the verification process may be delayed if you have not filed the appropriate taxes. Always file taxes early when applying for federal financial aid.

- *Copies of taxes are no longer accepted to verify income information*. The IRS Data Retrieval process via FAFSA on the Web (making no changes to income data once transferred) <u>must</u> be utilized *or* IRS Tax Return Transcripts <u>must</u> be supplied. A signed 1040X is also required if you amended taxes.

- Delays in submission of required documents can affect eligiility.

review paperwork prior to submitting

- Please review household information to ensure those persons you have listed qualify based on the instructions on the verification worksheet.

- Include the student SSN or UCID on attached documents. Double check that the verification worksheet includes the proper signatures.

financial aid award

- Any non-scholarship aid shown in a Preliminary Award is an ESTIMATE of eligibility. Complete awarding will be done following verification processing.

- Your submitted documents will be compared to your aid application, and UC will make any required adjustments with the federal processor. As such, verification processing by UC can take several days to complete once documents have been submitted.

- You can continue to monitor your aid status at *www.financialaid.uc.edu* or *www.onestop.uc.edu* using the "check my aid" link.

- Once complete, your financial aid award will be displayed online for you to accept or decline as desired.

THANK YOU FOR SUBMITTING REQUESTED PAPERWORK IN A TIMELY MANNER.

UNIVERSITY OF Cincinnati

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