



## 2010-2011 Verification Worksheet Federal Student Aid Programs



OFFICE OF SCHOLARSHIPS AND FINANCIAL AID  
STUDENT SERVICE COURT, MOUNT PLEASANT, MI 48859  
PHONE: (989) 774-3674; TOLL FREE: 1-888-392-0007  
FAX: (989) 774-3634; E-MAIL: CMUOSFA@CMICH.EDU  
WEBSITE: WWW.FINANCIALAID.CMICH.EDU

OMB 1845-0041

Your application was selected for review in a process called "Verification". In this process, CMU will compare information from your application with signed copies of your and your parent(s)' 2009 Federal tax forms, W-2 forms or other financial documents. If there are any differences between your application and your financial documents, CMU will send corrections to the Federal processor to have your information reprocessed. To retain your eligibility for Federal financial aid, you are required to comply with our request for documentation. We appreciate your cooperation.

### What you should do

1. Collect your and your parent(s)' financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to a CMU financial aid administrator if you have questions about completing this worksheet.
3. Complete both pages and sign the worksheet – you and at least one parent.
4. Take, send, or fax the completed worksheet, tax forms, W-2s and any other documents requested to CMU at the above address or fax number.

**Please submit your documentation as soon as possible so that your financial aid will not be delayed.**

*CMU must review the requested information under the financial aid program rules (34 CFR, Part 668).*

### A. Student Information

Student name (please print) \_\_\_\_\_

Social security number \_\_\_\_\_

Address (include apt. #) \_\_\_\_\_

Date of birth \_\_\_\_\_

City State Zip Code \_\_\_\_\_

Phone number (include area code) \_\_\_\_\_

### B. Family Information

List the people in your parent(s)' household, **include:**

- ☞ Yourself and your parent(s) (including stepparent) even if you don't live with your parents, **and**
- ☞ Your parent's other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2010 through June 30, 2011, or (b) the children would be required to provide parental information when applying for Federal Student Aid, **and**
- ☞ Other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2010 through June 30, 2011. Do not include foster children.

Write the names of all household members. Also write in the name of the college for any household member, excluding your parent(s), who will be attending college at least half-time between July 1, 2010 and June 30, 2011 and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		<b>Self</b>	<b>Central Michigan University</b>
		Mother/Stepmother (if applicable)	
		Father/Stepfather (if applicable)	

### C. Sign the worksheet

By our signatures, we certify that all the information reported on **both pages** of this worksheet is complete and correct. At least one parent **must** sign.

Student signature \_\_\_\_\_ Date \_\_\_\_\_

Parent signature \_\_\_\_\_ Date \_\_\_\_\_

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

**D. Student's and Parent(s)' Tax Forms and Income Information – Calendar Year 2009**

**DEPENDENT**

Tax returns include the 2009 Federal IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or call the IRS at 1-800-829-1040 and request a tax transcript.

**STUDENT:** One of the following must be checked.

- Attached is my **signed** 2009 Federal tax return .
- I will **not** file and am **not** required to file a 2009 Federal income tax return.

**PARENT(S):** One of the following must be checked.

- Attached is my/our **signed** 2009 Federal tax return
- I/We will **not** file and are **not** required to file a 2009 Federal income tax return.

**STUDENT:** One of the following must be checked.

- Attached are my 2009 W-2 forms from all employers.
- I did **not** receive any W-2 forms for 2009.
- W-2 forms were not requested.

**PARENT(S):** One of the following must be checked.

- Attached are my/our 2009 W-2 forms from all employers
- I/We did **not** receive any W-2 forms for 2009.
- W-2 forms were not requested.

**STUDENTS & PARENTS:** If you did **NOT** file and are **NOT** required to file a 2009 Federal income tax return, list below your employer(s) and any income received in 2009. (Attach W-2 forms or other earnings statements if applicable).

<b>STUDENT'S SOURCES:</b>	<b>AMOUNT:</b>	<b>PARENT(S)' SOURCES:</b>	<b>AMOUNT:</b>
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

**E. Untaxed Income, Benefits, and Income Exclusions (FAFSA Worksheets A, B, & C).**

STUDENT	REPORT ANNUAL AMOUNTS FOR 2009 (Do not leave any spaces blank. If zero, please type or write in \$0.)	PARENT (S)
	Welfare benefits, including Temporary Assistance to Needy Families (TANF). Do NOT include food stamps or subsidized housing.	
	Payments to tax-deferred pensions and savings plans paid directly or withheld from earnings, including, but not limited to, amounts reported on W-2 form(s) in boxes 12a through 12d, codes D, E, F, G, H, and S.	
	Child support you received for all children. Do NOT include foster care or adoption payments.	
	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	
	Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
	Any other untaxed income and benefits not reported elsewhere on this worksheet, such as workers' compensation, etc. Do NOT include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements.	
	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this worksheet.	
	Child support you paid because of divorce or separation, or legal arrangement. Do NOT include child support for children in your (or your parent(s)') household as listed in section B of this worksheet. <b><u>LIST NAMES OF THE CHILDREN FOR WHOM YOU PAID CHILD SUPPORT:</u></b>	
	Taxable earnings from Federal Work-Study or other need-based work programs earned in 2009	
	Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Include AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	

**Do not mail this worksheet to the U.S. Department of Education. Return to CMU OSFA. Make sure both pages are complete and correct and the first page is signed by the student AND parent. Do not forget to attach signed 2009 Federal tax forms and W-2s.**

## If a **Signed Federal Tax Return (1040)** and/or **W-2 forms** are requested...

The following information will help you determine what tax information you need to send to Central Michigan University. The following applies to students, spouses, parents and/or stepparents.

### **General Information**

- \* Make a **COPY** of your **2009 Federal Income Tax Return** – **DO NOT** send us your only copy.
- \* Be sure you **SIGN** page 1 or 2 of the **2009 Federal Income Tax Return** copy you send to us.
- \* The **ELECTRONIC FILING DECLARATION (Form 8453)** is **NOT** an acceptable **signature** and is not a complete tax return in itself.
- \* Send a **complete 2009 Federal Income Tax Return** - this means any schedules (A, B, C, etc.) must be included.
- \* **DO NOT** send your State or City Tax Return.
- \* If a parent has remarried, enclose the stepparent's **2009 Federal Income Tax Return** as well.
- \* Always put the student name and social security number legibly in the upper right corner.
- \* W-2 forms are **not** an income tax return – W-2 forms are documents you receive from your employer, reporting your income earned from working during 2009.
- \* If W-2 forms are requested they must be legible.
- \* Make sure the forms submitted to our office are exact copies of the information sent to the Internal Revenue Service (IRS).
- \* If you had a Tax Preparer (H & R Block, etc.) complete your Federal Income Tax Return **ALWAYS** get a copy of your **entire** return, not just a cover sheet.
- \* If you did not keep a copy of your **2009 Federal Income Tax Return**, you should request a tax return transcript by either calling the IRS at 1-800-829-1040 or printing and mailing a request form from [www.irs.gov](http://www.irs.gov) or request a copy from your tax preparer.
- \* If a student or parent did not file a **2009 Federal Income Tax Return**, you must tell us and we will send you a Parent Income Verification Form to complete.

### **Types of Federal Tax Returns**

If you filed a **2009 Federal**:

**1040EZ** - Submit a **signed** legible copy. Make sure the student name and social security number are located in the upper right corner.

**1040A** – Submit a complete (all schedules) **signed** legible copy. Make sure the student name and social security number are located in the upper right corner.

**1040** - Submit a complete (all schedules) **signed** legible copy. Make sure the student name and social security number are located in the upper right corner.

**Puerto Rico or Foreign Tax Return** - Submit a complete (all schedules) **signed** legible copy. Make sure the student name and social security number are located in the upper right corner.

**WE REQUIRE A SIGNATURE ON ALL TAX RETURNS TO BE CONSIDERED COMPLETE!**