



# 2011 – 2012 VERIFICATION WORKSHEET *for* INDEPENDENT STUDENTS

Your application was selected for review in a process called “Verification”. In this process, your school will be comparing information from your application with **signed** copies of your **2010 Federal tax forms (1040, 1040A, or 1040EZ)**, or with W-2 forms or other financial documents. Federal regulations state we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, we may send corrections electronically to have your information reprocessed. Complete the verification process as soon as possible so your financial aid won’t be delayed.

**\*\*\*\*IMPORTANT INFORMATION\*\*\*\***

- **If this worksheet and submitted tax return(s) are not signed they will be returned, which will delay your award.**
- **The verification process can take *approximately 8 weeks* from March through September.**
- **Due to heavy volume, please check your TopNet account rather than contacting our office to see if we have received your mailed or faxed documents.**
- **If missing or additional information is needed, we will email you within *approximately 4 weeks*.**
- **Watch your TopNet account for the latest updates on your account status. (See *Financial Aid / Eligibility*)**
- **Check your WKU email account often and respond quickly to requests for missing or additional information.**

**Submit the completed verification packet to our office.** Mailing address: *\*Student Financial Assistance, 1906 College Heights Blvd. #11018, Bowling Green, KY 42101-1018. FAX: 270-745-0116.*

➤ **DO NOT send information by Certified Mail as this delays delivery to our office.**

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

**A. STUDENT INFORMATION**

Last Name	First Name	M. I.	Student Social Security Number ( <i>not WKU ID</i> )
Address (include apt. no.)			Date of Birth
City	State	Zip Code	Phone Number (include area code)

**B. FAMILY INFORMATION**

List the people that you (and your spouse) will support between **July 1, 2011 and June 30, 2012**. **Include yourself, your spouse, your dependent children, and others who live with you (and your spouse) and for whom you (and your spouse) will provide more than half of their support.** Also, provide the name of the college for anyone listed who will be attending at least half time between **July 1, 2011 and June 30, 2012**, and will be enrolled in a degree or certificate program. Attach a separate page, if needed.

**Do not list any non-relatives or extended family members** in your household unless you can either provide court documentation showing that you have custody of those individuals or documentation showing that you are the one providing more than half of their support. **If you answered a dependency question incorrectly on your FAFSA, federal regulations may require you to provide parental data and income information.**

Full Name	Age	Relationship	College
		Self / Student	WKU

**C. SUBMIT A SIGNED COPY OF FEDERAL TAX FORMS AND PROVIDE INCOME INFORMATION**

**ATTN:** Tax filers must include a **signed** copy of the **2010 IRS Form 1040, 1040A, or 1040EZ**, a tax return from Puerto Rico or a foreign income tax return. **If you do not have a copy of the tax return**, you can request a **Tax Return Transcript** by calling the IRS at 1-800-829-1040. **Forms 8453 or 8879(e-file electronic signature pages) are not acceptable.** **Please sign where it says "Sign Here" on your 1040, 1040A or 1040EZ.**

Did you (**student**) file a **2010** Federal Tax Return? \_\_\_ Yes \_\_\_ No If yes, **attach a signed copy** of your 1040 tax return. If no, did you receive a **2010 W-2** from any employer? \_\_\_ Yes \_\_\_ No If yes, attach a copy of your **W-2(s)**.

Did your spouse file a **2010** Federal Tax Return? \_\_\_ Yes \_\_\_ No If yes, **attach a signed copy** of the 1040 tax return. If no, did your spouse(s) receive a **2010 W-2** from any employer? \_\_\_ Yes \_\_\_ No If yes, attach a copy of the **W-2(s)**.

**\*\*\*\* If you and/or your spouse DID NOT file a tax return or earn wages, list each source of support you and your family received in 2010 (such as social security, welfare benefits, help from relatives) AND the annual total received:**


**D. STUDENT (& SPOUSE) ADDITIONAL FINANCIAL AND UNTAXED INCOME INFORMATION**

**\*\*See your Student Aid Report (SAR) Questions 43 & 44\*\***

**\*\*\* BE SURE TO ENTER ZEROS IF NO FUNDS WERE RECEIVED \*\*\***

List <b>YEARLY TOTALS</b> for 2010	AMOUNT
Child Support <b>PAID</b> because of divorce or separation or as the result of a legal requirement. <b>Do not include support for children listed in your household in Section B</b> of this form. <b>List the NAME(S) of those children for whom you pay child support here:</b>	\$ List the name(s)
Student's taxable earnings from <b>AmeriCorps, Federal Work-Study, or a Cooperative Education Program offered by a college.</b> If you were not employed by WKU, please list the name of the college where you were employed (if applicable):	\$ Do not leave blank
Combat pay or special combat pay. <b>Only enter the amount that was taxable and included in the adjusted gross income. DO NOT enter untaxed combat pay reported on the W-2 (Box 12, Code Q)</b>	\$ Do not leave blank
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the <b>W-2 Form (NOT your 1040 tax return) in Boxes 12a through 12d, codes D, E, F, G, H, and S.</b>	\$ Do not leave blank
Child support <b>RECEIVED</b> for all children in the household. <b>DO NOT include foster care or adoption payments.</b>	\$ Do not leave blank
Housing, food, and other living allowances paid to members of the military, clergy, and other (including cash payments and cash value of benefits). <b>DO NOT include the value of on-based housing or the value of a basic military allowance for housing.</b>	\$ Do not leave blank
Veterans' non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.	\$ Do not leave blank
<b>Other: Worker's compensation, disability from work, first-time homebuyer credit, making work pay credit, etc. Specify source:</b> _____ <b>DO NOT include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$ Do not leave blank
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on the FAFSA.	\$ Do not leave blank



\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

## 2011-2012 VERIFICATION “Q&A”

### ❖ **What is Verification and how did I get selected?**

Verification is the process by which an educational institution confirms the accuracy of the data reported on an individual student’s FAFSA. About 30% of all *Free Applications for Federal Student Aid* (FAFSA’s) are selected for verification by the Central Processing System (CPS). Western Kentucky University (WKU), through the Office of Student Financial Assistance (SFA), may also select applicants for verification to correct any potential conflicts in information. If your application is selected, SFA is required to collect all necessary documentation from you and your parents or spouse, if applicable, per federal guidelines. Information from these documents is then compared to your FAFSA information and corrections to the FAFSA are made when necessary. SFA must verify **all** applicants selected for verification, including students previously verified by another school.

### ❖ **How will I know if my FAFSA is selected for Verification?**

All WKU students who are selected for verification will be sent a *Missing Information Letter* (MIL) to their WKU email requesting the federally required verification documents needed to complete the verification of their 2011-2012 FAFSA. If the student has **not** been assigned a WKU email, the MIL will be sent to the email listed on their FAFSA, or if no email is available, the student will be mailed an MIL.

### ❖ **What documents do I need to submit for Verification?**

- If you are a **DEPENDENT** student (answered “No” to all questions in “Step Three” of your FAFSA and had to provide parent information) please submit the following documents:
    1. **2011-2012 VERIFICATION WORKSHEET** for **DEPENDENT** STUDENTS
    2. **Signed** copy of your 2010 federal tax return, if applicable
      - If you did not file a tax return but earned wages, submit your 2010 W-2(s).
    3. **Signed** copy of your parent(s) 2010 federal tax return, if applicable
      - If your parent(s) did not file a tax return but earned wages, submit their 2010 W-2(s).
      - If your parent is **remarried**, please also include a signed copy your **step-parent’s 2010 federal tax return**, if they filed separate tax returns.
      - If your parents are **divorced or separated** and filed a “joint tax return”, please submit copies of their W-2(s) **and all schedules submitted with their federal tax return**.
  - If you are an **INDEPENDENT** student (you answered “Yes” to at least one question in “Step Three” of your FAFSA and did not have to provide parent information) please submit the following documents:
    1. **2011-2012 VERIFICATION WORKSHEET** for **INDEPENDENT** STUDENTS
    2. **Signed** copy of your 2010 federal tax return, if applicable
      - If you did not file a tax return but earned wages, submit your 2010 W-2(s).
      - If your spouse did not file a tax return but earned wages, submit their 2010 W-2(s).
      - If you were **divorced or separated** at the time the FAFSA was filed and filed a “joint tax return”, submit copies of your and your spouse’s W-2(s) **and all schedules submitted with your federal tax return**.
- ⇒ If you do not have a copy of the requested 2010 tax return(s), you can call the IRS at 1-800-829-1040 and request a “2010 Tax Return Transcript”. This form, signed by the taxpayer, is acceptable in lieu of an actual tax return. Forms 8453 or 8879 (e-file electronic signature pages) are not acceptable.
- ⇒ After submitting required verification documents to SFA, students should allow up to **4 weeks** for hand delivered, faxed, or mailed documents to show as “Complete” on TopNet (“Financial Aid”, “Financial Aid Eligibility”) due to heavy volume during our peak processing periods, and up to **8 weeks** for the entire verification process.

⇒ Additional forms that may be needed upon request:

1) 2011-2012 Asset Verification Form

*~May be needed if required asset information was not submitted on the 2011-2012 FAFSA for student and/or parent(s)*

2) 2011-2012 Explanation of Financial Support

*~May be needed if no tax return was filed and little or no household income was listed on the 2011-2012 FAFSA or 2011-2012 Verification Worksheet*

Please mail or fax the requested documentation to:

Student Financial Assistance  
317 Potter Hall  
Western Kentucky University  
1906 College Heights Blvd. #11018  
Bowling Green, KY 42101-1018  
**FAX: 270-745-0116**

❖ **How will I know if the documents I submitted have been received?**

Go to your Top Net account, then click on “Student Services,” “Financial Aid,” “Financial Aid Eligibility”. Once the requested documents have been received, they will show as “Complete” on TopNet. *After submitting required verification documents to SFA, students should allow up to 4 weeks for hand delivered, faxed, or mailed documents to show as “Complete” on TopNet (“Financial Aid”, “Financial Aid Eligibility”) due to heavy volume during our peak processing periods, and up to 8 weeks for the entire verification process.*

❖ **I thought I submitted all of the documents needed for Verification, but my TopNet account says “incomplete” or additional information is needed. Why are you requesting more information?**

If you did not submit all of the requested documentation or failed to complete or sign the submitted documents or if the counselor verifying your FAFSA needs additional information or documentation, you will be contacted by SFA and be requested to submit the information still needed to complete the verification process. Within 4 weeks, a very specific email will be sent to your WKU email (or the email listed on your FAFSA if a WKU email hasn't been assigned) explaining in detail what is needed. You may also be contacted by phone, if necessary, or mailed a request if no phone or email is available. **Please submit the requested information back to our office as soon as possible!!**

❖ **When is an application sent back for reprocessing and how will I be notified of any changes made to my FAFSA?**

If a discrepancy is found during the verification process, all necessary corrections are made to the FAFSA then sent to CPS for reprocessing. Once the corrections have been processed by CPS, you will receive another SAR which will reflect any changes made to your FAFSA as well as any changes to your Expected Family Contribution number (EFC). You will then be awarded financial aid based on the updated EFC.

❖ **How long does Verification take?**

After submitting all required verification documents to SFA, students should allow up to 4 weeks for hand delivered, faxed, or mailed documents to show as “Complete” on TopNet (“Financial Aid”, “Financial Aid Eligibility”) due to heavy volume during our peak processing periods. The entire verification process can take up to 8 weeks due to the quality of the verification documents submitted to SFA, the number of discrepancies and/or other student eligibility issues present on the application, and the volume of applications being received by SFA.

❖ **Is there anything else I need to know about the verification process?**

⇒ All verification documents must be received by August 1, 2011 to guarantee a student will be awarded by the fall semester “fees due date”, and by January 1, 2012 to guarantee that a student will be awarded by the spring semester “fees due date”.

- ⇒ *It is the responsibility of all students chosen for verification to submit the required verification documentation as listed below to SFA soon as possible. WKU does not award federal (Title IV) aid until the verification process is complete.*
- ⇒ *On the rare occasion that a student is selected for verification after being awarded Title IV aid, the student will be subject to all the rules and requirements of verification as those applicants who were selected before being awarded. If the student's federal Title IV aid eligibility changes as a result of corrections made through the verification process, any required return of Title IV funds will be returned to the appropriate accounts through the Office of Billings and Receivables, and the student will owe WKU for any remaining balance that may occur due to funds being returned. CPS will issue the student an updated SAR, reflecting any corrections made to their 2011-2012 FAFSA, and SFA will notify the student, through WKU email of any changes to their Title IV aid. All Title IV aid changes will also be reflected on their TopNet "Account Summary" (billing account information).*

**Please mail or fax the requested documentation to:**

**Student Financial Assistance  
317 Potter Hall  
Western Kentucky University  
1906 College Heights Blvd. #11018  
Bowling Green, KY 42101-1018  
FAX: [270-745-0116](tel:270-745-0116)**