

2009-2010 INDEPENDENT Verification Worksheet Instructions

Your 2009-10 financial aid application was selected for a review process called “**VERIFICATION.**”
If you do not complete the verification process, you forfeit federal student aid eligibility.

Avoid Verification Processing Delays

- We strongly recommend you submit all documents at the same time, within 14 business days.
- **Print your name and WSU 9-digit ID number on each document.**
- **Sign all tax forms. Keep photocopies for your records.**
- Monitor your document requirements and financial aid status on WSU Pipeline, <http://pipeline.wayne.edu>. Information cannot be provided via e-mail.

What You Must Do

1. Collect your and your spouse's (if you are married) **signed** financial documents. The following are acceptable 2008 federal tax forms:
 - IRS Form 1040
 - IRS Form 1040A
 - IRS Form 1040EZ
 - Paper copy of a federal e-file return
 - **Do not** submit IRS Form 8453. It does not provide enough information for verification.
 - **Do not** submit IRS Form 8879, E-file Signature Authorization. It is not a tax return.
 - Tax return from Puerto Rico
 - Foreign Income tax return
 - IRS Personal Tax Account Transcript
 - If you and/or your spouse's did not keep a copy of your 2008 tax return(s), request it/them from the IRS via telephone 800-829-1040, or by filing the “Request for Copy of Tax Return,” [Form 4506](http://www.irs.gov) available online at www.irs.gov.
2. **Complete both pages of the Verification Worksheet and sign page 2. Do not leave any section blank/incomplete.**
3. **Submit** both pages of the completed, signed worksheet and signed copies of your and your spouse's (if you are married) 2008 federal tax forms, including **all** 2008 W-2 forms, to the financial aid office.

NOTICE: If you or your spouse did not file **and are not required to file** a 2008 federal tax return, check the appropriate box in Section C of the verification worksheet.

Verification Process Deadlines

You must complete the verification process before your final eligibility for financial aid can be determined. We strongly recommend all documents be submitted within **14 days of receipt** of the verification notice or by the priority deadline of **April 30, 2009**, whichever date is earlier. The **last date** to submit documents is the last day of the term or your last day of enrollment in the 2009-10 academic year, whichever is earlier. If you do not complete the verification process, you forfeit federal student aid eligibility.

**2009-2010
INDEPENDENT Verification Worksheet**

Your 2009-10 financial aid application was selected for a review process called "VERIFICATION."

The Office of Student Financial Aid (OSFA) will compare information from your financial aid application with signed copies of your and your spouse's (if applicable) **2008 Tax Returns**. Return this form to **OSFA with the appropriate signed documents attached**.

If you do not complete the verification process, you forfeit federal student aid eligibility.

The deadline to submit documents is the last day of the term or your last day of enrollment in the 2009-10 academic year, whichever is earlier. We cannot certify Federal Direct loans after your last day of at-least-half-time enrollment.

We strongly recommend you submit all documents within 14 days of receipt of the verification notice.

1. 9-digit WSU Student #: _____ 2. Phone Number: (____) _____

3. Last Name: _____ First Name: _____ MI: _____

A. FAMILY MEMBERS LISTING – List the following (attach a separate page if necessary):

- Yourself and your spouse if you are married
- Your children, if you will provide more than half of their support from July 1, 2009 through June 30, 2010
- Other people currently living with you for whom you provide and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010

Names of Household Members: Spouse, Children and Others You Support (See above)	Age	Relationship to You	Will be enrolled in College 2009-10		Name of College or University Attending at Least half-time between July 1, 2008 and June 30, 2009
			YES	NO	
1.		SELF	X		WAYNE STATE UNIVERSITY
2.			<input type="checkbox"/>	<input type="checkbox"/>	
3.			<input type="checkbox"/>	<input type="checkbox"/>	
4.			<input type="checkbox"/>	<input type="checkbox"/>	
5.			<input type="checkbox"/>	<input type="checkbox"/>	

B. 2008 TAX FORMS AND ATTACHED INCOME INFORMATION (Please check all that apply):

- Attach** a signed copy of your and your spouse's (if you are married) **2008 federal income tax return** (form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return) AND copies of **all schedules** that were submitted with the federal income tax return.
- If you/your spouse did not keep a copy of the 2008 tax return, you must attach **an official IRS transcript**, which can be obtained by calling the **IRS** at 1-800-829-1040 or filing [Form 4506](http://www.irs.gov) available online at www.irs.gov.

- If you, and/or your spouse (if married), did not file AND **WERE NOT REQUIRED TO FILE** a 2008 federal income tax return, please check the appropriate box and complete the information as indicated below:

Student non-filer Spouse non-filer

If student or spouse is a **Non-Filer**, list any income received in **2008** (ATTACH W-2 or other earnings statement, if available):

Full Name	Relationship	Source of Income for 2008	Amount
			\$
			\$
			\$

C. SUPPLEMENTAL INFORMATION - Do not leave any blanks. Enter "0" if the amount is zero.
The form will be returned to you if you leave any blanks.

2008 UNTAXED INCOME	
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) - Including, but not limited to, amounts reported on the W-2 in Boxes 12a through 12d, codes D, E, F, G, H, & S.	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans - From IRS Form 1040-total of lines 28 + 32 or 1040A-line 17	\$
Child support you received for all children. Do not include foster care or adoption payments.	\$
Tax-exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b	\$
Untaxed portions of IRA distributions - From IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b) Exclude rollovers. If negative, enter a zero here.	\$
Untaxed portions of pensions - From IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b) Exclude rollovers. If negative, enter a zero here.	\$
Housing, food, and other living allowances paid to members of the <u>military, clergy, and others</u> (including cash payments and cash value of benefits).	\$
Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
Any other untaxed income or benefits not reported , such as workers' compensation, disability, etc. DO NOT Include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements, foreign income tax exclusion or credit for federal tax on special fuels.	\$
Cash support: money received , or paid on your <u>behalf</u> , (e.g., bills) and not reported elsewhere on this form.	\$
2008 Additional Financial Information	
Education credits (Hope and Lifetime Learning tax credits) -From IRS Form 1040-line 50 or 1040A-line 31	\$
Child support you paid because of divorce or separation or as a result of a legal requirement. DO NOT include support for children in your household as reported above.	\$
Taxable earnings reported as income , from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. These are earnings reported to the IRS in your adjusted gross income. If you did not file a tax return, you may use your W-2 to identify taxable earnings.	\$
Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.	\$

By signing this worksheet, I (we) certify that all information reported is complete and correct. You must sign this form. If you are married, your spouse's signature is optional. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. Remember to sign your tax forms.**

 Student Signature Date

 Spouse's Signature (optional) Date

Return this form with all documents attached to:
Wayne State University
Office of Student Financial Aid
P.O. Box 02340
42 West Warren Avenue
Detroit, MI 48202

Print your Name and Student ID Number on All Documents
 See www.pipeline.wayne.edu
 for your Aid Status

