2012–2013 Verification Worksheet

Your 2012–2013 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information we will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit all information to the financial aid office. We may ask for additional information. If you have questions about verification, contact our office as soon as possible so that your financial aid will not be delayed.

A. Student's Information

_____
Student's RU ID Number

_____
Student's Last Name Student's First Name Student's M.I.

_____
Student's Social Security Number

_____
Student's Street Address (include apt. no.)

_____
Student's Date of Birth

_____
City State Zip Code

_(_____)_____
Student's Home Phone Number

_____
Student's Email Address

_(_____)_____
Student's Alternate or Cell Phone Number

B. Independent Student's Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2012, through June 30, 2013, or if the child would be required to provide your information if they were completing a FAFSA for 2012–2013. 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, 2013.

Dependent Student's Family Information

List below the people in your parent(s)' household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2012, through June 30, 2013, or if the other children would be required to provide parental information if they were completing a FAFSA for 2012–2013. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provides more than half of their support and will continue to provide more than half of their support through June 30, 2013.

Include the name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2012, and June 30, 2013. *If more space is needed, attach a separate page with your name and RU ID Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
Marty Jones(example)	*28*	*Wife*	*Central University*	*Yes*
		Student	Roosevelt University	Yes
				No
				No
				No
				No
				No

Student's Name: _____ **RU ID #:** _____

C. Student's Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** If you (or your spouse, if married) filed, or will file, an amended 2011 IRS tax return, you must contact your financial aid administrator before completing this section.

   Instructions: Complete this section if you, the student, filed or will file a 2011 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

☐ I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2011 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *Your school will use the IRS information that was transferred in the verification process*.

☐ I, the student, have not yet used the IRS Data Retrieval Tool, but I will use the tool to transfer my (and, if married, my spouse's) 2011 IRS income information into my FAFSA once I have filed my 2011 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. Your school cannot complete the verification process until your (and, if married, your spouse's) IRS information has been transferred into your FAFSA.*

☐ I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school **2011 IRS tax return transcript(s)—**not photocopies of the income tax return. *To obtain an IRS tax return transcript, go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when your 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you are married and you and your spouse filed separate 2011 tax returns, you must submit tax return transcripts for both you and your spouse.*

   ☐ *Check here if an IRS tax return transcript(s) is attached to this worksheet.*

   ☐ *Check here if IRS tax return transcript(s) will be submitted to your school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to your school.*

2. TAX RETURN NONFILERS—Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2011 income tax return with the IRS.

Check the box that applies:

☐ The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2011.

☐ The student (and/or the student's spouse if married) was employed in 2011 and has listed below the names of all employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 W-2 forms issued to you (and, if married, to your spouse) by employers. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top*.

Employer's Name	2011 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	*$2,000.00*	*Yes*
		No
		No
		No
		No

Certification and Signatures

Signing this worksheet certifies that all of the Information reported on it is complete and correct. The student must sign and date.

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

_____ _____

Student's Signature **Date**

Print

Reset

STOP! **Only complete this page if you are a DEPENDENT STUDENT.**

Student's Name: _____ **RU ID #:** _____

D. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—**Important Note:** If the student's parent(s), filed or will file, an amended 2011 IRS tax return the student's financial aid administrator must be contacted before completing this section.

   Instructions: Complete this section if the student's parent(s) filed or will file a 2011 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.*

   Check the box that applies:

   ☐ The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2011 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process*.

   ☐ The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2011 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*

   ☐ The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2011 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2011 tax returns were filed, 2011 IRS tax return transcripts must be submitted for each parent.*

   ☐ *Check here if an IRS tax return transcript(s) is attached to this worksheet.*

   ☐ *Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.*

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and is not required to file a 2011 income tax return with the IRS.

   Check the box that applies:

   ☐ The parent(s) was not employed and had no income earned from work in 2011.

   ☐ The parent(s) was employed in 2011 and has listed below the names of all the parent's employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top*.

Employer's Name	2011 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	*$2,000.00* (example)	*Yes* (example)
		No
		No
		No
		No

Certification and Signatures

Signing this worksheet certifies that all of the information reported on it is complete and correct. One parent must sign and date.

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

_____ _____

Parent's Signature (**Required for Dependent Students ONLY**) Date

Submit this worksheet to the Roosevelt University Financial Aid Office.

430 S. Michigan Ave., Chicago, IL 60605. (866) 421-0935, Fax (312) 341-3545