2014–2015 Verification Worksheet

Student ID: ___________________   LAST NAME: __________________________   FIRST NAME: ____________________

IMPORTANT: The priority deadline for submitting this worksheet and all necessary forms is May 1, 2014.
While we will make every effort to complete awards for all students, we cannot guarantee an award will be finished in time or that all funding will still be available for fall disbursements if documents are received later than May 1st. Students may still begin classes on time; however, the student will be responsible for all charges and any late fees that may accrue before the award is finished.

If your family circumstances have recently changed, such as you have been recently married or divorced; or you have an unborn child on the way; or if you have special tax filing circumstances, such as a tax filing extension or amending/correcting your original 2013 tax return; please contact a Financial Aid Counselor for further guidance and instructions. If you have any other questions about this form or what needs to be submitted, please contact the Office of Financial Aid.

A. Number of Household Members and Number in College

Number of Household Members: List below the people in the student’s household. Include:

- The student.
- The student’s spouse, if the student is married.
- The student’s or spouse’s children if the student or spouse will provide more than half of the children’s support from July 1, 2014 through June 30, 2015, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Number in College: Include below information about any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution July 1, 2014 and June 30, 2015. Also include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
<th>Will be Enrolled at Least Half Time (Yes or No)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td></td>
<td></td>
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</tbody>
</table>


If the student or spouse earned income and filed, will file or are required to file a tax return, complete section B. If the student or spouse will not file, and are not required to file a tax return, complete Section C.

Important Note: If the student has filed, or will file, an amended 2013 IRS tax return, the student must contact a financial aid counselor before completing this section.

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**B. Student Tax Filers Only.** Check the box that applies:

- The student **has used** the IRS Data Retrieval Tool (DRT) in FAFSA on the Web to transfer 2013 IRS income tax return information into the student’s FAFSA.

- The student **has not yet used** the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2013 IRS income tax return information into the student’s FAFSA once the 2013 IRS income tax return has been filed.

- The student is **unable or chooses not to use** the IRS DRT in FAFSA on the Web, and instead will provide the school a **2013 IRS Tax Return Transcript(s)**. See instruction sheet: Requesting a Tax Return Transcript

If the student and spouse filed separate 2013 IRS income tax returns, **2013 IRS Tax Return Transcripts** must be provided for both. (The IRS DRT cannot be used to import tax information from separate returns)

- Check here if a **2013 IRS Tax Return Transcript(s)** is provided.

- Check here if a **2013 IRS Tax Return Transcript(s)** will be provided later. Please note: we will not be able to finish the review of your verification documents and subsequent financial aid award until this document is received. **All documents must be received by May 1st to meet priority deadline.**

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**C. Student Non-Tax Filers Only.**

Complete this section if the student will not file and was not required to file a 2013 income tax return with the IRS. Check the box that applies.

- The student and/or spouse were not employed and had no income earned from work in 2013.

- The student and/or spouse were employed in 2013 and have listed below the names of all employers, the amount earned from each employer in 2013, and whether a W-2 form is provided. [Provide copies of all 2013 W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue a W-2 form.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>2013 Amount Earned</th>
<th>W-2 Provided?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ABC Letters Inc. (example)</strong></td>
<td>$2,000.00</td>
<td>Yes</td>
</tr>
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</tbody>
</table>

Note: You may be required to provide documentation from the IRS that indicates a 2013 IRS income tax return was not filed with the IRS.
D. Independent Student’s Income Information to be Verified

<table>
<thead>
<tr>
<th>Students $</th>
<th>Complete EACH COLUMN, Enter ZERO if you do not have an amount to report. If you listed a spouse in Section A of this worksheet, the certifications and instructions below refer and apply to both you and your spouse. <strong>Do not leave anything blank.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>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 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S.</td>
<td></td>
</tr>
<tr>
<td>IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040-total of line 28 <strong>plus</strong> line 32 or 1040A-line 17</td>
<td></td>
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<tr>
<td>Total child support <strong>received</strong> in 2013 for all children. Don’t include foster care or adoption payments.</td>
<td></td>
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<tr>
<td>Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). <strong>Do not include</strong> military BAH.</td>
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<tr>
<td>Veterans non-education benefits, such as Disability, Death Pension, or Dependency &amp; Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.</td>
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</tr>
<tr>
<td>Other untaxed income not reported such as workers’ compensation, disability, etc. <strong>Do not include</strong> 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.</td>
<td></td>
</tr>
<tr>
<td>Money <strong>received</strong> or paid on your behalf (e.g. bills) not reported elsewhere on this form.</td>
<td></td>
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E. Child Support Paid

Complete this section if the student or spouse, who is a member of the student’s household, paid child support in 2013. List below the names of the persons who paid the child support, the names of the persons to whom the child support was paid, the names of the children for whom the child support was paid, and the total annual amount of child support that was paid in 2013 for each child.

If more space is needed, provide a separate page that includes the student’s name and ID number at the top.

<table>
<thead>
<tr>
<th>Name of Person Who Paid Child Support</th>
<th>Name of Person to Whom Child Support was Paid</th>
<th>Name of Child for Whom Support Was Paid</th>
<th>Amount of Child Support Paid in 2013</th>
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Note: We may require additional documentation, such as:

- A signed statement from the individual receiving the child support certifying the amount of child support received; or

- Copies of the child support payment checks, money order receipts, or similar records of electronic payments having been made
H. Receipt of SNAP Benefits

The student certifies that ____________________________________________, a member of the student’s household, received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as the Food Stamp Program) sometime during 2012 or 2013. SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433-3243).

The student’s household includes:

- The student.
- The student’s spouse, if the student is married.
- The student’s or spouse’s children if the student or spouse will provide more than half of the children’s support from July 1, 2014, through June 30, 2015, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other people’s support and will continue to provide more than half of their support through June 30, 2015.

Note: You may be required to provide documentation from the agency that issued the SNAP benefits in 2012 or 2013.

I. High School Completion Status

Provide one of the following documents that indicate the student’s high school completion status when the student will begin college in 2014–2015:

- A copy of the student’s high school diploma.
- A copy of the student’s final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student’s General Educational Development (GED) certificate, an official GED transcript that indicates the student passed the exam, or a state-authorized high school equivalent certificate.
- For students who completed secondary education in a foreign country, a copy of the “secondary school leaving certificate” or other similar document.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.
- For a homeschooled student from a state where state law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a homeschooled student from a state where state law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the Financial Aid Office.
NOTE: It is possible during Verification and review of your documents that we will determine additional information or documents will be needed to complete the process. We will communicate any such request through your campus e-mail and post the requests on your MyCWU checklist.

We recommend that you develop the habit of checking your campus email account and your MyCWU page at least weekly for any data requests. Prompt response to any request will prevent delays in finishing your award.

Please use the list below to insure you have attached ALL required documents prior to submission. Your Verification review cannot be finished and your resulting financial aid award cannot be completed if any of these items are missing.

☐ Completed 2014-2015 Verification Worksheet. Do NOT leave any section blank. If you have nothing to report, please enter “zero” or “n/a” if not applicable.

☐ Copy of the student’s 2013 tax information that has been verified by the IRS. We cannot accept copies of your actual tax return (1040-EZ, 1040-A, 1040 forms). You must use one of the following options to verify your tax information:
  1. Use the IRS Data Retrieval Tool on the FAFSA web site to electronically import your information into your FAFSA (see “Verification Help Sheet” for instructions); OR
  2. Request a “Tax Return Transcript” from the IRS by phone at 1-800-908-9946 or at www.irs.gov. Please ensure you request the correct form; a “Tax Account Transcript” does not provide enough information and will be returned. Please note that it will take a minimum of 6-10 days for the IRS to process your request.

☐ If married and filing separately, a copy of your spouse(s’) 2013 tax information that has been verified by the IRS. We cannot accept copies of their actual tax return (1040-EZ, 1040-A, 1040 forms). Please use either the IRS Data Retrieval Tool option or Tax Return Transcript option listed above.

☐ Copy of your (the student’s) 2013 W-2 Wage Statements if requested. (see your MyCWU checklist.)

☐ Copy of your spouse(s’) 2013 W-2 Wage Statements if requested. (see your MyCWU checklist.)

Certification and Signature

By signing below I certify that all of the information reported is complete and correct.

Print Student’s Name __________________________ Student's ID Number __________________________

Student’s Signature (Required) __________________________ Date ______________

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

Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records.

Please see next page for final instructions that must be completed in-person.
The following section can ONLY be completed IN-PERSON at the institution. If you cannot complete this form in-person, please contact the Financial Aid Office for further instructions.

Identity and Statement of Educational Purpose  
(To Be Signed at the Institution)

The student must appear in person at Central Washington University- Office of Financial Aid (or an official CWU University Center) to verify his or her identity by presenting a valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. The institution will maintain a copy of the student’s photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student’s ID.

In addition, the student must sign, in the presence of the institutional official, the following:

Statement of Educational Purpose

I certify that I _____________________________ am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending ___________________________ for 2014-2015.

(Name of Postsecondary Educational Institution)

____________________
(Student’s Signature)       (Date)

____________________
(Student’s ID Number)

Signed in the presence of: _________________________________________
   Print Name of CWU Designee/Staff

____________________        __________
Signature of CWU Designee/Staff                                 Date

Copy of original, verified photo identification attached?    [ ] Yes    [ ] No