

## Financial Aid Office

## 2009-2010 Quality Assurance Verification Worksheet

Your application for financial aid has been selected for a process called Quality Assurance Verification. In this process, we will compare the information from your FAFSA application with signed copies of your and your parent's 2008 Federal income tax returns. Federal regulations require we confirm your application information before awarding Federal aid.

If there are differences between information on your FAFSA and this worksheet, we may send corrections to the FAFSA processor. You will receive an acknowledgement reflecting these changes. If we do make corrections, please do not make any subsequent changes to your FAFSA data.

Complete this Verification Worksheet and submit it to our office as quickly as possible so your financial aid won't be delayed.

**What you should do:**

1. Collect your and your parent's signed **2008 Federal** income tax returns.
2. Complete and sign this worksheet – both you and a parent must complete and sign.
3. Send the completed worksheet and a signed copy of your and your parent(s)' 2008 Federal income tax returns to:

**FAX: 309 438-3755**

or mail to:

**Illinois State University  
Financial Aid Office  
Campus Box 2320  
Normal IL 61790-2320**

**A. Student Information.**

_____	_____	_____	_____
Last Name	First Name	M.I.	University ID Number
_____			_____
Permanent Home Address (include R.R., P.O. Box, or Apt. No.)			Date of Birth (MM/DD/YYYY)
_____	_____	_____	_____
City	State	ZIP	Student Daytime Telephone Number (with area code)

**B. Family Information.**

List all the people in your parent's household. ***Include yourself***, the parent(s) you live with and other people for whom your parent(s) provide more than one-half of their support.

Write the name of the college for anyone -- **except a parent** -- who will attend college at least half-time between July 1, 2009 and June 30, 2010, and who will be enrolled in a program leading to a degree, diploma or certificate.

Full Name	Age	Relationship to Student	College or University
(example) Inez Jones	18	sister	Parkside Community College
		self	Illinois State University

**IMPORTANT tax return copy information:**

If you filed a **Federal 1040** or **1040A**, we need only page 1 and page 2 (page 1 has name and SSN at top, page 2 has signature/date line at bottom), and Schedule K-1 (Form 1065) if you filed a 1065.

If you filed a **Federal 1040 EZ**, we need only the one page. **DO NOT** send your state tax return.

**DO NOT** send W2's, 1099's, or any other schedules unless they are requested by this office.

... please turn the page ↩

**C. Information from Parent's 2008 Federal Income Tax Return and Income Information.**

1. **Check ONE box only.** "Tax return" includes the **2008** IRS Form 1040, 1040A, 1040EZ, a tax return for Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return you filed, request a copy from your tax preparer or complete IRS Form 4506T and IRS will send you an official account transcript.  
 I have attached a signed, non-returnable copy of my **2008** Federal income tax return to this form. **OR**  
 I will not file and am not required to file a **2008** Federal income tax return.
2. List below each employer and any income received in **2008** (use your W-2 form(s), box 14 of IRS Schedule K-1 (Form 1065), or other earnings statement(s). Use a separate sheet of paper if you need more space.

	Employer(s) Name	2008 Earnings from W-2s (box 1) and 1065's	Total Earned
Father/Stepfather		+	
		+	
		+	=
Mother/Stepmother		+	
		+	
		+	=

**D. Information from Student's 2008 Federal Income Tax Return and Income Information.**

1. **Check ONE box only.** "Tax return" includes the **2008** IRS Form 1040, 1040A, 1040EZ, a tax return for Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return you filed, request a copy from your tax preparer or complete IRS Form 4506T and IRS will send you an official account transcript.  
 I have attached a signed, non-returnable copy of my **2008** Federal income tax return to this form. **OR**  
 I will not file and am not required to file a **2008** Federal income tax return.
2. List below each employer and any income received in **2008** (use your W-2 form(s), box 14 of IRS Schedule K-1 (Form 1065), or other earnings statement(s). Use a separate sheet of paper if you need more space.

	Employer(s) Name	2008 Earnings from W-2s (box 1) and 1065's	Total Earned
Student		+	
		+	=

**E. Additional Financial Information – List source(s) and amount(s) in the following table. Complete all items. Enter "\$0" for any that do not apply:**

STUDENT	(From questions 46 and 94 of FAFSA Form) Please Report Annual Amounts	PARENT(S)
\$	Child support <b>paid</b> because of divorce, legal separation or as a result of a legal requirement. Don't include support for children in your or your parent's household as reported in FAFSA question 96 for student or question 75 for parents.	\$
\$	Taxable earnings from Federal Work-Study or other need-based work program(s) ( <i>i.e.</i> , the work portion of a fellowship or assistantship).	\$
\$	Student grant and scholarship aid reported to the IRS in your (or your parents') 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. <b>Only enter the amount that was taxable and included in you or your parent's adjusted gross income.</b> Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
	<b>← TOTAL Adjustments to Income →</b>	

**F. Untaxed Income – List sources and amount(s) in the following table. Complete all items. Enter “\$0” for any that do not apply:**

STUDENT	(From questions 47 and 95 of FAFSA Form) Please Report Annual Amounts	PARENT(S)
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on Form W-2 Box(es) 12a through 12d, code(s) D, E, F, G, H and S.	\$
\$	Child support <b>received</b> for all children. Don't include foster care or adoption payments.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (include 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 or benefits not reported on this form in Section 1 or Section 2, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung benefits, disability, etc. <b>Don't include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, combat pay, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, <i>i.e.</i> , cafeteria plans, foreign income exclusion or credit for federal tax on special fuels.	\$
\$	<b>Money received</b> , or paid on your behalf, not reported elsewhere.	<b>XXXXXXX</b>
\$	<b>← TOTAL Untaxed Income →</b>	\$

**G. Sign this Worksheet**

By signing this worksheet, each of us certifies that all the information reported here to qualify for federal student aid is complete and correct.

\_\_\_\_\_  
student's signature

\_\_\_\_\_  
date

\_\_\_\_\_  
parent's signature

\_\_\_\_\_  
date

\_\_\_\_\_  
student's e-mail address

\_\_\_\_\_  
parent's e-mail address

**Make and retain a copy of the completed form for your records.**

**Please FAX the completed original form to: 309 438-3755 (secure document imaging)**

or mail to: **Illinois State University Financial Aid Office, Campus Box 2320, Normal, IL 61790-2320.**

**If you have questions about completing this worksheet, call the Illinois State University Financial Aid Office, (309) 438-2231 or e-mail [financialaid@ilstu.edu](mailto:financialaid@ilstu.edu).**