

## 2017–2018 Aggregate Verification Worksheet

### V5-Independent Student

Your 2017–2018 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "Verification". The Financial Aid Office at your college must compare information from your FAFSA with information you provide on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected and your Financial Aid Office could require additional documentation. You will not receive federal financial aid until all verification requirements are met and the necessary corrections made.

#### What You Should Do

1. If you (or your spouse, if married) are tax filers, obtain a **2015 IRS Tax Return Transcript** for yourself and your spouse. Request an IRS Tax Return Transcript online at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or by phone at 1-800-908-9946. Make sure you select an IRS Tax Return Transcript and NOT the IRS Tax Account Transcript. Be sure to specify **tax year 2015** when making your request. In place of the transcript, the Financial Aid Office can accept a complete signed copy of a preparer's **2015 Federal Income Tax Return [Form 1040, 1040A or 1040EZ]** that was submitted to the IRS. **Important Note:** If you used the IRS Data Retrieval Tool to transfer your 2015 income data into your FAFSA, you may not have to submit the IRS Tax Return Transcript.
2. If you or your spouse had income earned from work in 2015, but did not and were not required to file a tax return, you each must provide all **W-2 forms** for tax year 2015 issued to each of you by your employers.
3. Complete Sections A-C of this worksheet – you must sign the Section D certification on page 2 of the worksheet. Collect the documents required for Section E on page 3 but do **NOT** complete that page in advance.
4. Submit the completed worksheet, tax return transcript(s) and any other required documents to the Financial Aid Office at your college. You will complete Section F in person at that time.

#### A. Student's Information

Student's Last Name	First Name	M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's CUNYfirst ID / Empl ID
City, State, Zip Code			Student's Date of Birth
Student's Phone Number (include area code)			Student's Email Address

#### B. Student's Household Information

List the people you will support between July 1, 2017 and June 30, 2018. Include:

- Yourself and your spouse (if you are married)
- Your other children if you (or your spouse) provide more than half of their support, even if they don't live with you.
- Other people if they now live with you, and you now provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.

Write the name of the college below 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, 2017 and June 30, 2018.

*If more space is needed, attach a separate page with student's name and the last 4 digits of student's SSN at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Example: Jane Smith</i>	<i>18</i>	<i>Sister</i>	<i>State University</i>	<i>Yes</i>
		Self		

#### C. Student/Spouse's Income Information to Be Verified

<b>Student Name:</b>	<b>Student SSN: XXX-XX- _____</b>
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**NOTE:** Notify the Financial Aid Office at your college if you and your spouse had a change in marital status after December 31, 2015 or filed (or will file) an amended 2015 IRS tax return.

**Check the appropriate box (or boxes):**

- ☐ I/we used the IRS Data Retrieval Tool in FAFSA-on-the-Web to transfer 2015 IRS income tax information into the FAFSA. [*The income tax information from the FAFSA will be used to complete the verification process.*]
- ☐ I/we did not (or could not) transfer my/our 2015 income information to the FAFSA using the IRS Data Retrieval Tool. I/we have attached to this worksheet a copy of my **2015 IRS Tax Return Transcript** or a signed preparer's copy of the **2015 Federal Income Tax Return (Form 1040, 1040A or 1040EZ)** that was submitted to the IRS.
- ☐ I/we have not filed (and are not required to file) a 2015 federal income tax return and I/we had no income earned from work in 2015.
- ☐ I/we have not filed (and are not required to file) a 2015 federal income tax return but I/we had income earned from work in 2015 as listed below. [*List every employer and the amounts earned in 2015, even if an IRS Form W-2 was not issued. You must attach copies of all 2015 IRS Forms W-2 that were issued to you by your employers.*]

*If more space is needed, attach a separate page with student's name and the last 4 digits of student's SSN at the top.*

<b>Employer's Name</b>	<b>2015 Amount Earned</b>	<b>2015 IRS Form W2 Attached?</b>
<i>Example: ABC Company</i>	<i>\$1367.75</i>	<i>Yes</i>

**D. Certification and Signatures**

I/we certify that all the information reported on this worksheet is complete and correct. I/we understand that if we purposely give false or misleading information, I/we could be fined, jailed, or both.

<b>Student Signature</b>	<b>Date</b>
<b>Spouse Signature</b>	<b>Date</b>

***Do not mail this worksheet to the U.S. Department of Education.***

***Submit this worksheet to the Financial Aid Office at your college.***

***You should make a copy of this worksheet and all submitted documents for your records.***

***You must complete Section F on page 3 of this worksheet IN PERSON at the Financial Aid Office at your college.***

<b>Student Name:</b>	<b>Student SSN: XXX-XX- _____</b>
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## E. Identity Verification and Statement of Educational Purpose

***Do not complete this page in advance. You must complete and sign this page IN PERSON at the Financial Aid Office at your college.***

You have been selected by the U.S. Department of Education to verify your identity and educational plans. You must appear in person at the Financial Aid Office at your college and present a piece of valid government-issued identification to a financial aid representative. The representative will review and copy this piece of identification which will be maintained in your student file.

### Statement of Educational Purpose

I certify that I, \_\_\_\_\_  
(Print Name)

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 2017-2018.  
(Name of CUNY Institution Attending)

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### OFFICE USE ONLY- DO NOT WRITE BELOW

#### 1. Proof of Identity

The above-named student has presented valid government-issued photo identification such as a state driver's license, non-driver's license or passport which verifies his or her identity.

FA Certifying Officer's Signature	Date Received	Type of Valid ID Collected

#### 2. Completion of High School or the Equivalent

The above-named student has submitted a final high school transcript or other acceptable documentation to the appropriate CUNY office that shows evidence of graduation from an accredited high school or educational institution, state-issued general education equivalency (GED), or evidence of home schooling.

FA Certifying Officer's Signature	Date Received