

# 2011-12 USU Verification Application Instructions and Notes

## Parent Wages & Earnings (Box 1)

Report parent earnings whether or not your parent(s) filed a tax return. You must report each parent's earnings separately, do not combine individual earnings. Please report business or farm income, if any.

## Divorced or Separated?

If your parents are legally separated or divorced after filing jointly for 2010, please write "divorced" or "separated" in box one, page 1, on the Verification Form.

## Stepparents

For the purposes of financial aid, your stepparent is considered a parent. You must include your stepparent's income information.

## Student Wages & Earnings (Box 2)

Report your earnings whether or not you filed a tax return. Please report your spouse's earnings separately, do not combine your individual earnings. If you filed as married on the FAFSA, report your spouse's earnings whether or not they filed a tax return. If you applied as married on the 2011-2012 FAFSA, we are required to collect a **signed** copy of both your 2010 federal tax return (if you filed) and your spouse's 2010 tax return (if they filed) whether or not you were married in 2010. Please report business or farm income, if any.

## Divorced or Separated?

If you are divorced or legally separated **after** filing jointly with your spouse for 2010, please write "divorced" or "separated" on page one of the Verification Form.

## Where do I report funds received as an LDS missionary?

For the purposes of financial aid, LDS missionaries are considered clergy. Item 13 on page 2 asks you to report the funds you received while serving your mission in 2010. Do not report the amount you or your parents submitted to the LDS Church for you. Instead, report the funds you received from your mission office in 2010 to cover your expenses in US Dollars.

## How do I list household members on page 3?

### If required to list parent information on the FAFSA:

- List your name on the first line; and
- List your parents (including stepparent) even if you don't live with your parents; and
- List your parents' other children, even if they don't live with your parent(s), if (a) your parent(s) provide more than half of their support from July 1, 2011 through June 30, 2012 or (b) the children would be required to list parental information when applying for federal student aid; and
- List other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2011 through June 30, 2012 (Do not include foster children.); and
- List the college for any household member, **excluding** your parent(s), who will be attending college at least half-time between July 1, 2011 and June 30, 2012 in a degree, diploma, or certificate program
- Include missionaries in your parent's household if your family contributed funds to your church for their support.

## Are you considered independent for financial aid purposes?

This was determined on your FAFSA. You are considered "**dependent**" if you don't meet the conditions below whether or not your parents provide you with any financial support or claim you on their taxes. Dependent students must report parent information on the verification application. *If you meet any of the conditions below you are considered "**independent**."*

- I was born before January 1, 1988.
- I am working on a masters or Ph.D. **during the 2011-12** school year.
- I am an orphan or ward of the court.
- I am a qualifying veteran of the U.S. Armed Forces.
- I applied as married on the 2011-12 FAFSA.
- I have children or dependents receiving more than half of their support from me.
- I am currently serving on active duty in the U.S. Armed Forces for purposes other than training.

There are other rare circumstances that may determine if you need to provide parental information. Contact our office if you have questions about your status.

## Married Since Filing?

If you filed as a "dependent" on your FAFSA and have since married, the law **does not allow** you to update your marital status. You must complete this form as a dependent and report information about your parent's family.

### If you were not required to list parent information:

- List your name on the first line; and
- List your spouse (if you applied as married on the FAFSA);
- List your children, if you will provide more than half of their support from July 1, 2011 to June 30, 2012; and
- List 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 from July 1, 2011 through June 30, 2012 (Do not include foster children.); and
- List the college for any household member, who will be attending college at least half-time between July 1, 2011 and June 30, 2012 in a degree, diploma, or certificate program.

### Expecting a child?

If you or your spouse is pregnant and the child is due before June 30, 2012, include the child as a member of the household. Please indicate a due date.

**Instructions and Notes: Please submit only the following two items:**

**Verification form (3 Pages):**

**2010 Student, Spouse, Parent Tax forms Pages 1&2:**

USU 2010-11 Financial Aid Verification Form

VERIF 1112

Name: [Blank] Address: [Blank] City: [Blank] State: [Blank] Zip: [Blank]

Parent 1: Name [Blank] Address [Blank] City [Blank] State [Blank] Zip [Blank]

Parent 2: Name [Blank] Address [Blank] City [Blank] State [Blank] Zip [Blank]

Student: Name [Blank] Address [Blank] City [Blank] State [Blank] Zip [Blank]

Spouse: Name [Blank] Address [Blank] City [Blank] State [Blank] Zip [Blank]

Income sections for Parents, Student, and Spouse.



1040 U.S. Individual Income Tax Return 2010

Name, Address, and SSN: [Blank]

Filing Status: [Blank]

Exemptions: [Blank]

Income: [Blank]

Adjusted Gross Income: [Blank]

Refund: [Blank]

Signature: [Blank]

**Must be signed!**

**Please do NOT submit copies of your worksheets, tax schedules, state taxes, W-2s, or e-file signature pages. The forms shown above are sufficient.**

- We cannot award financial aid until we have a complete and signed Verification Form and copies of required 2010 dependent tax returns. Forms 1040, 1040A, and 1040EZ are valid tax returns for verification purposes.
- Not required to file taxes? No problem, make sure you fill out page one with your income and earnings.
- The e-file signature page is *not* a valid tax form for verification.
- Don't have a copy of your taxes? You can request a "tax return transcript" by calling the IRS at 1-800-829-1040. *Tax transcripts must be signed at the bottom of the last page of the transcript.*
- Filed jointly? Please include a *signed* copy of the joint return.
- Dependent? Please include a signed copy of your parent's taxes and your taxes if you filed.
- Amended tax returns? We need a *signed* copy of the original and a *signed* copy of the amended form.
- If you filed for an extension on your taxes, please contact our office for additional forms to document your estimated income and tax liability.
- Your tax forms must be *signed* in the signature block or they are not valid for verification purposes.
- Please allow 1-2 weeks for FAFSA corrections and financial aid packaging. We will then notify you by email of your aid status

\*\*\*Please note: 1040 and 1040A forms are two pages, 1040EZ is only one page\*\*\*

Please fax or mail these forms to:  
 Fax: (435) 797-0654 - USU Financial Aid Office, Taggart Student Center Room 106, Logan UT 84322-1800  
 Associate degree students in Price and San Juan can continue to deliver their applications to their local office.

# USU 2011-12 Financial Aid Verification Form

VERIF

1112

Student Name:		Student Number: <b>A</b>	
Student SSN:	Student Birth Date (month/day/year):	Student Daytime Phone Number:	
Spouse Name:		Spouse USU A-Number or SSN:	
Parent Name:		Parent Daytime Phone Number:	

Your application was selected for review in a process called verification. We cannot offer any financial aid until we have a complete and signed Verification Form and copies of any required 2010 federal tax returns. Please complete this form and submit it to our office with the requested signed tax forms as soon as possible. If the amounts that you reported on your FAFSA do not agree with what you listed on this application and tax forms, we will update your FAFSA application. Please allow 1-2 weeks for processing. Do not submit any FAFSA corrections from this point on. *If you filed for an extension on your taxes before the deadline, contact our office for additional forms to document your estimated income and tax liability.*

- ▶ Were you required to report parent information on the 2011-2012 FAFSA?  
**If yes, complete boxes 1 and 2 below. If no, skip box 1, complete box 2 below.** Yes  No

---

- ▶ If you were you required to report parent information on the 2011-2012 FAFSA, will or did your parents file a federal tax return for 2010?  
**If yes, please submit a signed copy of your parents' 2010 federal tax return.** Yes  No   
Not required

---

- ▶ Did you apply as married on the 2011-2012 FAFSA?  
**If yes, skip box 1, complete box 2 below with your and your spouse's information.** Yes  No

---

- ▶ Will you or did you file a federal tax return for the year 2010?  
**If yes, please submit a signed copy of your 2010 federal tax return.** Yes  No

---

- ▶ If you applied as married on FAFSA, will or did your spouse file a federal tax return for 2010?  
**If yes, please submit a signed copy of their 2010 federal tax return or a copy of the joint return if you filed jointly.** Yes  No   
Not married

*Please refer to the 2010 W2 and federal 1040 or 1040A or 1040EZ tax forms for boxes 1 and 2.*

## Box 1. Parent Information:

*If you were you required to report parent information on the 2011-2012 FAFSA, report below how much your parent(s) earned in 2010. Please refer to their W2s. If your parents filed as married on the FAFSA, you must report both parents' earnings. List your parents' earnings separately based what they earned individually. *If they filed taxes, these amounts should add up to what is listed on 1040EZ line 1 or 1040A line 7 or 1040 line 7.* Report business and/or farm income on 1A and 1B. If your parent(s) did not file taxes in 2010, you must still report their earnings. **No earnings in 2010? Please write 0.00.***

Father's portion: \$ \_\_\_\_\_

Mother's portion: \$ \_\_\_\_\_

**1A.** If your parents were required to report **business income** on the 1040, please review Line 12 and Box 14 (code A) of IRS Schedule K-1 (Form 1065) and list here:

Father's portion: \$ \_\_\_\_\_

Mother's portion: \$ \_\_\_\_\_

**1B.** If your parents were required to report **farm income** on the 1040, please review Line 18 and list here:

Father's portion: \$ \_\_\_\_\_

Mother's portion: \$ \_\_\_\_\_

## Box 2. Student (and Spouse) Information:

Report below how much you earned in 2010. Please refer to your W2s. *If you filed as married on the FAFSA, you must also report your spouse's earnings. List your earnings separately from your spouse's earnings. *If you filed taxes, these amounts should add up to what is listed on 1040EZ line 1 or 1040A line 7 or 1040 line 7.* Report business and/or farm income on 2A and 2B. If you did not file taxes in 2010, you must still report your earnings. **No earnings in 2010? Please write 0.00.***

Student portion: \$ \_\_\_\_\_

Spouse portion: \$ \_\_\_\_\_

**2A.** If you (and/or your spouse) were required to report **business income** on the 1040, please review Line 12 and Box 14 (code A) of IRS Schedule K-1 (Form 1065) and list here:

Student portion: \$ \_\_\_\_\_

Spouse portion: \$ \_\_\_\_\_

**2B.** If you or your spouse were required to report **farm income** on the 1040, please review Line 18 and list here:

Student portion: \$ \_\_\_\_\_

Spouse portion: \$ \_\_\_\_\_

For office use only: CORR TOL OK Initial Date QC Initial

**Continue to Page 2**

**2011-12 USU Verification Form Page 2.** Please enter your name and student number here.

Student Name:	Student Number: <b>A</b>
---------------	-----------------------------

**FAFSA Additional Income Verification**

Please review the following worksheets and list any funds you (and your parents, if you're dependent) earned in any of these categories in 2010 only. ***If you applied as married*** on the FAFSA, report the total of both your and your spouse's dollar amounts per item on the Student & Spouse side of the worksheet tables.

**Please sign here if all of the items below are \$0.00.**

X \_\_\_\_\_

Item #	Parent(s)	Please use 2010 Calendar year income information. 2010 Additional Financial Information – Report ANNUAL amounts.	Student & Spouse		
1.		Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS Form 1040 -- line 49 or 1040A -- line 31.			
2.		Child support paid because of divorce or separation or as a result of a legal requirement. <b>Don't include</b> support for children in your (or your parents') household that you will list on question 5, page 3, of this form.	List children you paid child support to:		
				1. _____	4. _____
				2. _____	5. _____
				3. _____	6. _____
3.		Taxable earnings from need-based employment programs, such as <b>Federal Work-Study</b> and need-based employment portions of fellowships and assistantships.			
4a.		Taxable student grant and scholarship aid reported to the IRS in your (or your parents') <b>adjusted gross income</b> including grant or scholarship portions of fellowships and assistantships.			
4b.		Taxable <b>AmeriCorps benefits</b> reported to the IRS in your (or your parents') <b>adjusted gross income</b> including awards, living allowances, and interest accrual payments.			
5.		Combat pay or special combat pay. Only enter the amount that was <b>taxable and included in your adjusted gross income</b> . Do not enter untaxed combat pay.			
6.		Earnings from work under a cooperative education program offered by a college.			

**2010 Untaxed Income - Report ANNUAL amounts.**

7.		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.	
8.		IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 - line 28 + line 32 or 1040A - line 17.	
9.		Child support received for any of your children. <b>Don't include</b> foster care or adoption payments.	
10.		Tax exempt interest income from IRS Form 1040 - line 8b or 1040A - line 8b.	
11.		Untaxed portions of IRA distributions from IRS Form 1040 - lines (15a minus 15b) or 1040A - lines (11a minus 11b). <b>Exclude rollovers</b> . If negative, enter a zero here.	
12.		Untaxed portions of pensions from IRS Form 1040 - lines (16a minus 16b) or 1040A - lines (12a minus 12b). <b>Exclude rollovers</b> . If negative, enter a zero here.	
13.		Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits) <b>Missionaries</b> : See instructions <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	
14.		Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.	
15.		<b>Other untaxed income such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040—line 67 and Making Work Pay credit IRS Form 1040EZ—line 8, 1040A—line 40, 1040—line 63.</b> DON'T INCLUDE student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	
16.		Bills paid on your behalf or other money received in 2010, not reported elsewhere on this form (student only)	

**2011-12 USU Verification Form Page 3.**

Student Number:  
**A**

<p>Write your name and on the first line, also, if you:  <b>Filed with your parent information</b> on the FAFSA, list parent name(s), siblings, and other dependents they support according to the <i>first page of instructions</i>.  <b>Filed as married</b> on the FAFSA, list the names of your spouse, children, and other dependents that you support according to the <i>first page of instructions</i>.  <b>Filed as single, separated, or divorced</b> on the FAFSA, list children or other dependents, if any, that you support according to the <i>first page of instructions</i>.</p>	<p><b>List family member's relationship to student</b> (i.e. parent, spouse, sibling, etc.)</p>	<p>If the family members you listed (excluding your parents) are attending other universities, colleges, or trade schools <b>at least half-time</b> between July 1, 2011 and June 30, 2012 in a degree, diploma, or certificate program, please write the name of the institution.</p>
<p>Student Name: 1.</p>	<p><i>me</i></p>	<p><i>Utah State University</i></p>
<p>2.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>3.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>4.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>5.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>6.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>7.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>8.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>9.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>10.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>11.</p>		<p>Write name of university, college, or trade school; if attending:</p>
<p>12.</p>		<p>Write name of university, college, or trade school; if attending:</p>

If you need more space to list additional members, please attach a separate page.

**Required Signatures**

By signing this form, I certify that all of the information is **complete and correct**. I understand that the Financial Aid Office may update my Student Aid Report with the information from this application and my **signed** 2010 tax returns if there are discrepancies. *If any information is missing or incorrect, the processing of my aid will be delayed. If I purposely give false or misleading information, I may be fined, sentenced to jail, or both.*

\_\_\_\_\_  
Student Signature (required) Date

\_\_\_\_\_  
Parent signature (required for dependent student) Date

**Please submit or fax PAGES 1-3 of the completed Verification Form and required signed tax forms to:**

USU Financial Aid Office  
 Taggart Student Center 106  
 Utah State University  
 Logan UT 84322-1800  
 Fax: (435) 797-0654

Associate degree students in Price and San Juan can continue to deliver their applications to their local office.

- Please allow 1-2 weeks for FAFSA corrections and financial aid packaging. We will then notify you by email of your aid status, or
- You can check your status on USU Access anytime at [www.usu.edu/myusu](http://www.usu.edu/myusu), log in to Access (Banner), after you log in, click on "Financial Aid," click on "To-Do List."
- Or call (435) 797-0173 if you have any questions.

**Deadlines for submitting verification paperwork:**  
 You will not be eligible for financial aid if you miss the following deadlines for verification:

**Student loans:**  
 Verification paperwork must be submitted by the last day of class before finals week.

**Pell grant:**  
 Verification paperwork must be submitted no later than one week after the term.

There are additional deadlines for tuition payment, course registration, financial aid appeals, etc. Please visit us online at [www.usu.edu/finaid/deadlines](http://www.usu.edu/finaid/deadlines) for more detail.