



# 2011-2012 VERIFICATION WORKSHEET

## *Independent Students*

The University of Kansas  
Financial Aid & Scholarships  
www.financialaid.ku.edu

Strong Hall  
1450 Jayhawk Blvd., Room 50  
Lawrence, KS 66045

Phone: (785) 864-4700  
Fax: (785) 864-5469  
Email: financialaid@ku.edu

First Name

Last Name

MI

KUID Number

Phone

Email Address

*Note: Verification correspondence will be sent to the e-mail address listed above. If an e-mail message is returned to Financial Aid & Scholarships (FAS) as undeliverable, a letter will be sent to the student's KU-registered email address.*

Your application has been selected for review in a process called "Verification." In this process, Financial Aid & Scholarships (FAS) must compare information from your Free Application for Federal Student Aid (FAFSA) with signed copies of your and your spouse's 2010 federal tax forms, W-2 forms and/or other financial documents. Section 483 of the Higher Education Act of 1965, as amended, gives us the authority to ask for this information before awarding federal aid. FAS will compare the submitted documents to your FAFSA information. If there are any discrepancies, FAS may request further clarification. If corrections are needed, FAS will make them on your behalf. FAS can help you if you have questions about completing this worksheet. **All verification documents for the 2011-12 academic year must be submitted by May 1, 2012. However, if you wish to be considered for limited-funding aid programs, the date for COMPLETING the verification process for the 2011-12 academic year is March 15, 2011. Verification file review may take up to four weeks.**

**No federal, state, or institutional financial aid will be awarded to you until the verification process is complete.**

It is important you respond promptly to this request. We cannot award you financial aid until your file is complete. Some aid programs are limited in funding and may not be available to you if the completion of your file is delayed.

What you need to do:

1. Collect and photocopy your (and your spouse's) signed 2010 federal income tax forms, schedules, W-2s and 1099 forms. **Do not send original tax documents. They will NOT be returned.**
2. Complete and sign this worksheet.
3. Submit the completed worksheet and signed copies of tax forms and other documents to the KU FAS (address/fax indicated above) as soon as possible so that your aid will not be delayed. Once you submit verification documents, please do not make any corrections to your FAFSA unless you are instructed to do so by FAS.

### Household Information

In the grid below list the following people:

- Yourself
- Your spouse
- Your dependent children (if you will provide more than half their support from July 1, 2011 through June 30, 2012; or the children could answer "No" to questions regarding *Student Dependency Status* (Section 2) on the FAFSA)

Include other people as part of your family only if:

- They lived with you and received more than half their support from you at the time you completed your FAFSA
- AND
- They will continue to get more than half their support from you from July 1, 2011 through June 30, 2012

Full Name	Age	Relationship	Marital Status as of Today *	College/University ** <i>(see note below)</i>	Student ID # <i>(see note below)</i>
		<i>Self</i>		<i>The University of Kansas</i>	

\* Choose one: Single, Married, Re-married, Separated, Divorced, Widowed

\*\* Of those listed above, write in the name of the college and student ID number for any family member who will be enrolled at least half-time in a degree or certificate program between July 1, 2011 and June 30, 2012. If you need additional space, please attach a separate page.

2010 ADDITIONAL FINANCIAL INFORMATION		
	Student	Spouse
Child support you <b>paid</b> because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported on the front page of this form.	\$	\$
Taxable earnings from need-based employment programs such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$	\$
Grant and scholarship aid <b>reported to the IRS in the adjusted gross income</b> . Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$	\$
Taxable earnings from a Cooperative Education program.	\$	\$
2010 UNTAXED INCOME		
	Student	Spouse
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 (Boxes 12a through 12d, codes D, E, F, G, H, and S).	\$	\$
Child support you <b>received</b> for all children. Do not include foster care or adoption payments.	\$	\$
Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include rent subsidies for low-income housing, the values of on-base military housing or the value of a basic military allowance for housing.	\$	\$
Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income not reported, such as worker's compensation, disability, untaxed unemployment benefits, first-time homebuyer's credit, etc. <b>DO NOT INCLUDE:</b> 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.	\$	\$
Money <b>received</b> , or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$	XXXXXX

### 2010 TAX FORMS AND SUPPORTING DOCUMENTS

Attach a **signed** copy of all 2010 federal income tax returns filed by you and your spouse. IRS tax forms may include 1040, 1040A, 1040EZ, 1040X, a tax return from Puerto Rico, or foreign income tax return(s). Include all schedules. Do not submit state tax returns. Attach copies of all 2010 W-2s and 1099s even if you (or your spouse) did not file a 2010 federal income tax return. If you did not receive a W-2 from your employer, contact the FAS for instructions.

*If you or your spouse filed a 2010 federal tax return but did not keep a copy, you can obtain a transcript summary of the return and W-2s by sending in Form 4506T, the "Request for Transcript of Tax Return," to the IRS. This form is available on the IRS website at [www.irs.gov](http://www.irs.gov). Transcript summaries must be **signed** by the taxpayer unless sent directly from the IRS.*

Whose tax return(s) are attached? (check all that apply)

Your own                       Your spouse's                       Joint Return

Whose W-2(s) and/or 1099(s) are attached? (check all that apply)

Your own                       Your spouse's

I (we) did NOT file and am (are) NOT required to file a 2010 federal income tax return. (check all that apply)

You                               Your spouse

I (we) did NOT earn any income in 2010. (check all that apply)

You                               Your spouse

### PLEASE SIGN BELOW

By signing this worksheet, I certify that all of the information reported on this worksheet is complete and correct to the best of my knowledge. *I also understand if I purposefully give false or misleading information on this worksheet, I would be violating federal statute, and could face penalty.* In addition, I understand that documents (including the Verification Worksheet) may be copied if I have a spouse or child who attends KU.

STUDENT SIGNATURE (REQUIRED)

DATE