

### 2012-2013 Verification Worksheet Independent Students

Your application was selected for review in a process called "Federal Verification." In this process, Carnegie Mellon is comparing information from your FAFSA to information contained in your CSS PROFILE and copies of your (and your spouse's, if married) 2011 IRS Tax Return Transcripts, and with W-2 forms or other financial documents. All of the information that you submitted in the application process must be reviewed for accuracy and free from any conflicting documentation or inconsistencies before finalizing your financial aid eligibility. If there are differences between your application information and your financial documents, we will submit the required changes on your behalf.

Complete the sections of this form that are applicable to your own family situation. All students should complete **Section I: STUDENT/FAMILY INFORMATION**. Please pay careful attention to the instructions provided in this section.

In **Section II: TAX AND INCOME INFORMATION**, you (and your spouse) should complete the fields relating to the sources of untaxed income received as defined on the FAFSA. If you (or your spouse) are not required to file a Federal Income Tax Return, complete the Sources of Income Received.

In **Section III: OTHER INFORMATION TO BE VERIFIED**, you should complete this section if someone in your household received food stamps or if you or your spouse paid child support.

Once this form is complete, submit it to the Student Financial Aid Office as soon as possible, so that finalization of your financial aid won't be delayed. Remember that you (and your spouse, if married) must sign this form.

### SECTION I: STUDENT/FAMILY INFORMATION

Student Name: \_\_\_\_\_ Student ID Number: \_\_\_\_\_  
Last First M.I. mm/dd/yyyy

Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Street Address/P.O. Box

\_\_\_\_\_ City State Zip Code Country

Phone Number: ( ) \_\_\_\_\_

Complete the chart below with the information about the people in your household that you and your spouse will support between July 1, 2012 and June 30, 2013.

Include the following:

- Yourself
- Your spouse and your children if you will provide more than half of their support from July 1, 2012 through June 30, 2013.
- Other people if they now live with you, and you provide more than half of their support, and you will continue to provide more than half of their support from July 1, 2012 through June 30, 2013.
- Report your household members in college if they will attend, for at least 6 credit hours (or half time) in at least one term between July 1, 2012 and June 30, 2013, a program that leads to a college degree or certificate.

Always include yourself as a college student. You may include others only if they will attend, at least half time in 2012-2013, a program that leads to a college degree. We will verify the number reported in college. Please promptly notify us if there is any change.

Full Name	Age	Relationship to Applicant	College/University attended (at least half time) in 2012-2013
		<i>Self</i>	

## SECTION II: TAX AND INCOME INFORMATION

### STUDENT'S TAX AND INCOME (all applicants)

1. If you filed a 2011 IRS Tax Return (Form 1040, 10410A, 1040EZ), you are required to submit a 2011 IRS Tax Return Transcript(s) to complete federal verification. We also require legible copies of all W-2 wage and tax statements.

You must submit to the university a copy of your 2011 IRS Tax Return Transcript(s) - not photocopies of the Income Tax Return. To obtain an IRS Tax Return Transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure you order the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS Tax Return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers.

- Check here if your IRS Tax Return Transcript(s) is attached to this worksheet.
- Check here if your IRS Tax Return Transcript(s) will be submitted to us later. Note: Verification cannot be completed until the IRS Tax Return transcript(s) has been submitted.
- Check here if you will not file and are not required to file a 2011 U.S. Income Tax Return.
- Check here if you filed an tax return other than an IRS form, such as a foreign or Puerto Rican tax form. Note: If you filed a tax return other than an IRS form, the income information (converted to U.S. dollars) must be used to complete a U.S. Income Tax Return. The U.S. Tax Return conversion must be signed by you and the tax accountant completing the conversion and submitted to complete federal verification.

#### 2. Untaxed income as reported on FAFSA question 44 (c, g, h, i and j).

Sources of Untaxed Income	2011 Amount
c. Child support received (do not include foster or adoption payments)	\$
g. Housing, food, living allowances paid to military, clergy, others	\$
h. Veterans noneducation benefits	\$
i. Other untaxed income not reported (i.e., workers' compensation, disability)	\$
j. Money received or paid on your behalf (i.e., bills)	\$

3. If you did not file and are not required to file a 2011 Federal Income Tax return, list below your employer(s) and any income received in 2011 (use the W-2 form or other earnings statements, and submit legible copies).

Sources of Income Received	2011 Income
	\$
	\$
	\$

### SPOUSE'S (if married) TAX AND INCOME

1. If spouse filed a 2011 IRS Tax Return (Form 1040, 10410A, 1040EZ), he/she is required to submit a 2011 IRS Tax Return Transcript(s) to complete federal verification. We also require legible copies of his/her W-2 wage and tax statements.

Spouse must submit to the university a copy of his/her 2011 IRS Tax Return Transcript(s) - not photocopies of the Income Tax Return. To obtain an IRS Tax Return Transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure spouse orders the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Spouse will need their Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS Tax Return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If you and your spouse filed separate 2011 Tax Returns, then 2011 IRS Tax Return Transcripts must be submitted for each.

- Check here if spouse's IRS Tax Return Transcript(s) is attached to this worksheet.
- Check here if spouse's IRS Tax Return Transcript(s) will be submitted to us later. Note: Verification cannot be completed until the IRS Tax Return transcript(s) has been submitted.
- Check here if spouse will not file and is not required to file a 2011 U.S. Income Tax Return.
- Check here if spouse filed an tax return other than an IRS form, such as a foreign or Puerto Rican tax form. Note: If he/she filed a tax return other than an IRS form, the income information (converted to U.S. dollars) must be used to complete a U.S. Income Tax Return. The U.S. Tax Return conversion must be signed by you and the tax accountant completing the conversion and submitted to complete federal verification.

**2. Untaxed income as reported on FAFSA question 44 (c, g, h, i and j).**

Sources of Untaxed Income	2011 Amount
c. Child support received (do not include foster or adoption payments)	\$
g. Housing, food, living allowances paid to military, clergy, others	\$
h. Veterans noneducation benefits	\$
i. Other untaxed income not reported (i.e., workers' compensation, disability)	\$

3. If your spouse did not file and is not required to file a 2011 Federal Income Tax return, list below your his/her employer(s) and any income he/she received in 2011 (use the W-2 form or other earnings statements, and submit legible copies).

Sources of Income Received	2011 Income
	\$
	\$
	\$

**SECTION III: OTHER INFORMATION TO BE VERIFIED**

1. Complete this section if someone in your household (listed in Section I) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2010 or 2011 calendar years.

One of the persons listed in Section I of this worksheet received SNAP benefits in 2010 or 2011. If asked by the university, I (we) will provide documentation of the receipt of SNAP benefits during 2010 and/or 2011.

2. Complete this section if you and/or your spouse paid child support in 2011.

The student and/or spouse listed in Section I of this worksheet paid child support in 2011. Indicated below is the name(s) of the person who paid the child support, the name of the person to whom the child support was paid, the name of the children for whom child support was paid, and the total annual amount of child support that was paid in 2011 for each child. If asked by the university, I (we) will provide documentation of the payment of child support.

*If you need more space, attach a separate page that includes the student's name and Social Security Number at the top.*

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support was Paid	Amount of Child Support Paid in 2011
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000</i>

**SIGNATURES**

Each person signing this form certifies that all information reported on it is complete and correct. The student and at least one parent must sign.

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

Spouse's Signature: \_\_\_\_\_ Date: \_\_\_\_\_