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UTSA ID

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Student's Last Name

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Student's First Name

# UTSA INDEPENDENT VERIFICATION WORKSHEET

# 2008-2009

## FEDERAL STUDENT AID PROGRAMS

University of Texas at San Antonio – One UTSA Circle - San Antonio- Texas- 78249-0687 - (210) 458-8000
FinancialAid@UTSA.edu www.utsa.edu/financialaid/

Your application was selected for review in a process called "verification". In this process, UTSA will be comparing information from your FAFSA application with **signed copies of your 2007 federal tax forms** (and your spouse's if you are married). The law states we have the right to ask you for this information before awarding federal aid. If there are differences between your application information and your financial documents, we may need to send in corrections on your Student Aid Report (SAR) and have a new SAR processed. Failure to submit the required documentation will delay processing of your file.

**What you should do:**

1. Collect your (and your spouse's) financial documents (**copies of all 2007 signed income tax forms and copies of all 2007 W2's**)
2. Talk to your financial aid counselor if you have questions about completing this worksheet.
3. **Complete** and **sign** the worksheet - you (and your spouse).
4. Take the completed worksheet, tax forms, and any other documents your school needs to Enrollment Services.

***Please submit all documents at the same time, and write your name and Student ID at the top of every document. Documentation may be submitted in person at the Enrollment Services counter, via U.S. mail, or at our drop box location. Documentation submitted via FAX cannot be accepted and the documents will have to be resubmitted.***

**UTSA will compare information on these documents. We may need to make corrections on your SAR and send it back to the application processor.**
**UTSA must review the requested information, under the financial aid program rules (34 CFR, Section 668)*

## A. Student Information

Last Name _____ First Name _____ M.I. _____ UTSA ID _____

Phone No. (include area code) _____ Your UTSA E-Mail Address _____

## B. Family Information

**Independent Students:** List the people that you (and your spouse) will support between July 1, 2008 and June 30, 2009. Include yourself, your spouse, your children, and other people if they live with you (and you provide more than half of their support and will continue to provide half their support from July 1, 2008 through June 30, 2009).

**Include other people as part of your family only if:**

- They lived with you (or your spouse or parents) and got more than half their support from you (or your spouse) at the time you completed your student aid application, AND
- They will continue to get more than half their support from July 1, 2008 through June 30, 2009.

**Write the names of all family members.** Also write in the name of the college for any family member who will be attending college at least half-time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

| Full Name | Age | Relationship | College |
|---|---|---|---|
| *Example: Missy Jones* | *24* | *Wife* | *UTSA* |
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UTSA ID

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Student's Last Name

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Student's First Name

## C. Tax Forms and Income Information

All tax filers must submit a **signed copy of all 2007 Federal Income Tax returns** (Includes 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return) and **copies of all 2007 W2's**. If you did not keep a copy of the tax return, request a copy from you tax preparer or a copy of an IRS form that lists tax account information.

Independent students, please check and return to UTSA all **signed Tax returns and copies of all 2007 W2's** that apply:

Your own Your spouse's Your joint return

**All non-tax filers must check the box for those persons who did not file and were not required to file a 2007 Federal Income Tax Return.**

Your own Your spouse

If a tax return was not filed, but income was received from work in 2007, list that income below and submit the W-2 form(s) or other earnings statement(s) if available.

| **Name of Employer(s)** | **Student Amount** | **Spouse Amount** |
|---|---|---|
| | | |
| | | |
| | | |

**Both tax filers and non-tax filers must list any untaxed income *received* in 2007.**
**Please refer to FAFSA Worksheet A&B**

| **2007 Untaxed Income** | **Student Amount** | **Spouse Amount** |
|---|---|---|
| Child Support **Received** | | |
| Untaxed Social Security Benefits | | |
| Welfare Benefits | | |
| Worker's Compensation | | |
| Other (401K, Pension plans, etc.) | | |

**Both tax filers and non-tax filers must list the following income *received, credited, or paid* in 2007.**
**Please refer to FAFSA Worksheet C**

| **2007 Income/Credit/Paid** | **Student Amount** | **Spouse Amount** |
|---|---|---|
| Child Support **Paid** | | |
| Education Credits (Hope & Lifetime Learning) from 1040 tax return | | |
| Taxable earnings from Federal Work-Study or other need-based work programs | | |
| Student grant, scholarship, fellowship, & assistantship aid, reported to IRS in **adjusted gross income** line from 1040 tax return(s) | | |

## D. Sign this Worksheet

By signing this worksheet, I (we) certify that all information reported to qualify for federal student aid is complete and correct. (If married, spouse must sign. If dependent, at least one parent must sign.)

_____ ____ _____ ____

Student's Signature Date Spouse's Signature Date

**If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail or both.**

**Return this form to**:
The University of Texas at San Antonio
Enrollment Services
One UTSA Circle
San Antonio, TX 78249-0687
(210)458-8000
1-800-669-0919

**PRIVACY NOTICE**

With a few exceptions, you are entitled to be informed about the information U.T. San Antonio collects about you. Under Sections 552.021 and 552.023 of the Texas Government Code, you are entitled to receive and review this information. Under Section 559.004 of the Texas Government Code, you are entitled to have U.T. San Antonio correct information about you that is held by us and that is incorrect, in accordance with the procedures set forth in the University of Texas System Business Procedures Memorandum 32. The information that U.T. San Antonio collects will be retained and maintained as required by Texas records retention laws (Section 441.180 et seq. of the Texas Government code) and rules. Different types of information are kept for different periods of time.