



Office of Student Financial Aid
P.O. Box 9961 - Building 122
Baton Rouge, Louisiana 70813-9961
(225) 771-2790 fax: (225) 771-5898
www.subr.edu

Name _____

SSN _____

2009-2010 Verification Procedures

Thank you for choosing Southern University as your home for higher education. As you have been selected for a process called verification, this document is intended to help you through the verification process. This form will provide you with information needed to complete your verification. Frequently asked questions and answers are also provided for your convenience as well as a checklist to help you gather all documents required. This should help simplify the process for you, however, please make certain you have all of the required documentation completed before sending it to the Office of Student Financial Aid (OSFA). When everything is completed, please return it to:

Southern University
Office of Student Financial Aid
P.O. Box 9961 –Building 122
Baton Rouge, Louisiana 70813-9961

Frequently Asked Questions

How did I get selected for verification?

Each year the Department of Education selects at least 30% of federal student aid applications to check accuracy of the data. In some cases, schools may verify more applications by their own selection criteria or due to some conflicting data indicated on the application.

Who reviews my file?

All forms used in verification are to be sent to the OSFA. A financial aid counselor will review the information on the documents. All information will remain confidential.

What if a mistake is found?

If any items have to be corrected, the OSFA will send changes in to the Central Processing Center electronically. You will receive a new, non-correctable SAR Information Acknowledgement, which allows you to see the changes made and results.

Will a change in the information affect my student aid award?

In most cases, corrections could affect financial aid estimates sent to you earlier. The OSFA will send you a revised Award Letter reflecting any amounts that have been changed.

What if I or my parent(s) have questions about verification?

If there are any questions, you may call the Office of Student Financial Aid at (225)771-2790.

Checklist

Send the following documents to the Office of Student Financial Aid.

- ✓ **Completed 2009-2010 Federal Institutional Verification Form**
- ✓ **Student's 2008 Federal Income Tax Return** *signed and dated* (Provide spouse's return, if married) and W-2s, if requested.
- ✓ **Parent(s)' 2008 Federal Income Tax Return** *signed and dated* (if student is dependent by government definition for aid purposes) and W-2s, if requested.
- ✓ **Signed and dated** Worksheets A, B, and C listing student's, spouse's or parent(s)' untaxed income for 2008 (See inside of this form)

Make certain:

- All forms are signed and dated.
- All sections are complete.
(Put N/A or "0" if it does not apply).
- All forms should be sent together, partial submissions will prevent further processing of your application.

Please remember:

- **All of your financial arrangements must be made with the Cashiers Office. NO financial aid awards will be awarded disbursed until verification is complete.**
- **And most importantly, BE SURE to respond immediately to requests for additional information if needed. During the peak processing season, there may not be sufficient time for multiple reminder letters.**

2009-2010 Federal Institutional Verification Form

Your application was selected for review in a process called "Verification." In this process, Southern University will be comparing information from your application with signed copies of your (and your spouse's, if married), and your parent(s)/stepparent(s)' 2008 federal tax forms (if dependent), with W-2 forms or other financial documents. 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, Southern University will send corrections electronically, to have your information reprocessed.

What you should do:

1. Collect your (and your spouse's) or parent(s)/stepparent(s)' signed income tax forms, W-2s, forms, etc.
2. Contact the Office of Student Financial Aid if you have questions about completing this form at (225)771-2790.
3. Completely fill in and sign this form.
4. Send the completed form, tax information, and any other requested documents to the Office of Student Financial Aid, as soon as possible to ensure that your process won't be delayed.
5. Our office must compare the information on these documents, under the financial aid program rules (CFR Title 34, Part 668) and make any necessary corrections to your SAR, if required.

A. Student Information

Name: _____

SSN: _____

Permanent Address: _____

DOB: _____

Phone: _____

Email: _____

B. Family Information

List the people in your household, include:

If independent: (see definition below)*

- Yourself and your spouse (if you have one) and
- Your children, if you will provide more than half of their support from July 1, 2009 through June 30, 2010, and
- Your dependent children (if they live with you and you provide more than half of their support from now to June 30, 2010)

If you are dependent:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- Your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2009 through June 30, 2010, or (b) the children would be required to provide parental information when applying for Federal Student Aid

Include other people as part of your family only if:

- They now live with you (or your parents, if dependent) and received more than half their support from you (or your spouse) or from your parent(s)/ stepparent(s) (if dependent)
- AND
- They will continue to receive more than half of their support from you (or your spouse) or from your parent(s)/stepparent(s) (if dependent) from July 1, 2009 through June 30, 2010.

Write the names of all household members in the spaces (s) below. Also write the name of the college for any household member, including your parent(s), excluding your parent(s) if independent, who will be attending college at least half-time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship to you	College
		Self	Southern University

*A student is considered an independent student for federal purposes if any of the following are true: 1) Born before January 1, 1986; 2) As of today, you are a married individual; 3) Have dependents who live with the student and receive more than half of their support from you now and through June 30, 2010; 4) Have children who will receive more than half of their support from you between July 1, 2009 and June 30, 2010 ; 5) An orphan or ward of the court; 6) A veteran of the U.S. Armed Forces or Currently serving on Active duty in the U.S. Armed Forces for purposes other than training; 7) Working on a Master's or doctorate program during the 2009-2010; 8) Any time on or after July, 1, 2008 you were designated as an unaccompanied youth who was homeless.

C. Tax Information

- Tax Filers:** Include a copy of your 2008 IRS Form 1040, 1040A, 1040EZ, Telefile Tax Record, or a foreign income tax return and W-2s, if requested. If you did not keep a copy of your tax return, please contact the IRS at 1-800-829-1040 and request an RTFTP or Form 4868; request a copy from your tax preparer.
- Non-Tax Filers:**
- Check here if student will not file and is not required to file a 2008 U.S. Income Tax Return. (Please complete and sign Non-Tax Filer Statement on the back of this form).
- Check here if spouse/parent(s)/stepparent(s) will not file and is not required to file a 2008 U.S. Income Tax Return. (Please complete and sign the Non-Tax Filer Statement on the back of this form).

D. Students and Parent(s) 2008 Additional Financial Information and Untaxed Income - DO NOT LEAVE THESE SECTIONS BLANK. Even though you may have few of these items, check carefully. This form may be returned to you for completion if left blank. If an item does not apply, put a zero or N/A.

Student (and Spouse)	Untaxed Income (formerly Worksheet B) See question 47 (for Student/Spouse) and question 95 (for Parents, if dependent) of the Free Application for Federal Student Aid (FAFSA) Calendar Year 2008	Parent(s)
	Payments to tax -deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on the W-2 Form in Box 12a-12d, codes D,E,F,G,H, and S	
	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17	
	Child support Received for all children. Don't include foster care or adoption payments.	
	Tax Exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b	
	Untaxed portions of IRA distributions from IRS Form 1040-lines (15 a minus 15b) or 1040A-lines (11 a minus 11b). Excluding rollovers. If negative, enter a zero here.	
	Untaxed portions of pensions from IRS form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	
	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	
	Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIG) and/or VA Educational Work-Study Allowances	
	Other untaxed income or benefits not reported elsewhere, such as worker's compensation, disability, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed social security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	
	Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.	Do Not Report
	Total Untaxed Income -Student (and spouse)	Total Untaxed Income - Parent(s)
Student (and Spouse)	Additional Financial Information (formerly Worksheet C) See question 46 (for Student/Spouse) and question 94 (for Parents, if dependent) of the Free Application for Federal Student Aid (FAFSA) Calendar Year 2008	Parent(s)
	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	
	Child support paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your (or your parents') household, as reported in question 96 (or question 75 for your parents).	
	Taxable earnings from Federal Work-Study or other need-based employment portions of fellowships/assistantships.	
	Student grant and scholarship aid reported to the IRS in your adjusted gross income, includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant aid and scholarship portions of fellowships and assistantships.	
	Combat pay or special pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 form in Box 12, Code Q.	
	Total Additional Financial Information— Student (and spouse)	Total Additional Financial Information-Parent(s)

By signing this form, I (we) certify that all information reported to qualify for Federal student aid is complete and correct.

Student (and Spouse)

Date

Parent(s)

Date

Warning: If you purposely give false or misleading information on this worksheet, you may be fined and/or sentenced to jail.

Southern University Office of Student Financial Aid

2009-2010 Non-Tax Filers' Statement

Student/Spouse Statement of Non-Filing

***DO NOT COMPLETE THIS FORM IF YOU ARE REQUIRED TO FILE A FEDERAL TAX RETURN.**

Student Name: _____ SSN: _____

Spouse Name: _____ SSN: _____

I/We certify that I/we **did not, will not, and are not required to** file a 2008 Federal Income Tax Return. I/We further understand that any false statement herein will result in the denial of **ALL** Title IV Funds.

List below your (and your spouse's) employer(s) and any income received in 2008 (use the W-2 form or other earning statements, if available).

Sources of Income (Use the W-2 form or other earnings statement)	2008 Income
	\$
	\$
	\$
	\$

Student Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

Parent Statement of Non-Filing

***DO NOT COMPLETE THIS FORM IF YOU ARE REQUIRED TO FILE A FEDERAL TAX RETURN.**

Student's Name: _____ Student's SSN or SID#: _____

Father/Step-father's Name: _____

Mother/Step-Mother's Name: _____

I/We certify that I/we **did not, will not, and are not required to** file a 2008 Federal Income Tax Return. I/We further understand that any false statement herein will result in the denial of **ALL** Title IV Funds.

List below your parents' employer (s) and any income received in 2008 (use the W-2 form or other earning statements, if available).

Sources of Income (Use the W-2 form or other earnings statement)	2008 Income
	\$
	\$
	\$
	\$

Father/Step-Father's Signature _____ Date: _____

Mother/Step-Mother's Signature _____ Date: _____

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