



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 _____

2008-2009 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 2008-2009 Federal Institutional Verification Form**
- ✓ **Student's 2007 Federal Income Tax Return** *signed and dated* (Provide spouse's return, if married) and W-2s, if requested.
- ✓ **Parent(s)' 2007 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 2007 (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.

Please remember:

- All of your financial arrangements must be made with the Cashiers Office. **NO** financial aid awards will be 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.

2008-2009 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)' 2007 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.**
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: _____

Permanent Address: _____

SSN: _____

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, 2008 through June 30, 2009, and
- Your dependent children (if they live with you and you provide more than half of their support from now to June 30, 2009)

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, 2008 through June 30, 2009, 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 lived with you and received more than half their support from you (or your spouse) or from your parent(s)/stepparent(s) (if dependent) at the time you completed your aid application
- 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, 2008 through June 30, 2009.

Write the names of all household members. Also write the name of the college for any household member, including your parent(s), who will be attending college at least half-time between July 1, 2008 and June 30, 2009 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, 1985; 2) A married individual; 3) Has children or dependents who live with the student and receive more than half their support from them; 4) An orphan or ward of the court; 5) A veteran of the U.S. Armed Forces; 6) Working on a Master's or doctorate program during the 2008-2009.

C. Tax Information

Tax Filers: Include a copy of your 2007 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 2007 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 2007 U.S. Income Tax Return. (Please complete and sign the Non-Tax Filer Statement on the back of this form).

D. Federal Worksheets - DO NOT LEAVE THESE SECTIONS BLANK. Even though you may have few of these items, **check carefully. This form will be returned to you for completion if left blank. If an item does not apply, put a zero or N/A.**

Student (and Spouse)	Worksheet A Calendar Year 2007	Parent(s)
	Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; 1040EZ-line 8a	
	Additional child tax credit from IRS Form 1040-line 68 or 1040A-line 41	
	Welfare benefits, including temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	
	Social Security benefits received that were not taxed (such as SSI or disability)	
	Total Section A-Student (and spouse)	Total Section A-Parent(s)
Student (and Spouse)	Worksheet B Calendar Year 2007	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	
	Foreign income exclusion from IRS Form 2555-line 45 or 2555EZ-lme 18	
	Untaxed portions of IRA distributions from IRS Form 1040-lines (1 5a 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.	
	Credit for federal tax on special fuels from IRS Form 4 136-line 17 (non-farmers only)	
	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits) i.e. BAQ (W-2 code Q)	
	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 on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. Tax filers only: report combat pay not included in AGI (FAFSA questions 35 and 79). Don't include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements (e.g. Cafeteria Plans).	
	Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.	
	Total Section B-Student (and spouse)	Total Section B-Parent(s)
Student (and Spouse)	Worksheet C Calendar Year 2007	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. Do not include support for children in your (or your parents') household, as reported in question 90 (or question 66 for your parents).	
	Taxable earnings from Federal Work-Study or other need-based employment portions of fellowships/assistantships.	
	Student grant, scholarship, and fellowship aid, including AmeriCorps awards, that was reported to the IRS in your (or your parents') adjusted gross income	
	Total Section C— Student (and spouse)	Total Section C-Parent(s)

By signing this worksheet, 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

2008-2009 Non-Tax Filers' Statement

Student/Parent 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** and **will not** file a 2007 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 2007.

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

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.**

Father/Step-father's Name: _____

Please provide students name and SSN in the space provided at the top of this form.

Mother/Step-Mother's Name: _____

I/We certify that I/we **did not** and **will not** file a 2007 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 2007.

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

Father/Step-Father's Signature _____ Date _____

Mother/Step-Mother's Signature _____ Date _____