



**Student Financial Aid**  
 2308 Rendleman Hall Campus Box 1060  
 Edwardsville, IL 62026-1060  
 Phone: (618) 650-3880 Fax: 618-650-3885  
 Email: [finaid@siue.edu](mailto:finaid@siue.edu) Homepage: [www.siue.edu/financialaid](http://www.siue.edu/financialaid)

**Institutional  
 Verification Form  
 2008-2009**

IVF

Name \_\_\_\_\_ University ID \_\_\_\_\_  
(last) (first) (middle initial)

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
(PO Box, Street, Apt.#, etc.)

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ Email \_\_\_\_\_@siue.edu

**Section A: Family Information / Household Size / Number in College**

Fill in the charts below with information about household members.

**Household Size**

For help determining household size, read the attached "Guide to Reporting Household Size."

Name (first and last)	Age	Relationship to you
1. (your name)		self
2.		
3.		
4.		
5.		
6.		
7.		

Check this box if there are more than seven family members and attach a list of these people with the above information.

**Number in College**

For help determining number in college, read the attached "Guide to Reporting Number in College."

Student (Do not include Parent)	Social Security Number	College Name and Location
1. (Self)	xxx-xx-xxx	SIUE / Edwardsville, Illinois 62026
2.		
3.		
4.		

**Section B-1, 2, 3: Instructions (Do not leave any sections blank.)**

Dependent students - Complete the student and parent columns. **Both signatures required.**

Independent students - Complete the student/spouse column. **Student signature required.**

<b>B - 1: 2007 Wages and Salaries</b>	Student/Spouse	Parent(s)
<u>Tax Filer</u> - Attach appropriate <b>SIGNED</b> copy(ies) of the 2007 federal tax return (Form 1040, 1040A, 1040EZ, or IRS Form 1722), ALL schedules, and ALL corresponding W-2s to this form and submit to our office. <u>IRS Form 8453 can not be used per Department of Education.</u> If you did not keep a copy of the tax return, request a copy from your tax preparer or a copy of an Internal Revenue Service form that lists tax account information. <b>Tax returns not SIGNED will be returned for signatures, DELAYING the verification process.</b>	<input type="checkbox"/> Filed taxes in 2007.  <b>Attach 1040 &amp; W-2s</b>	<input type="checkbox"/> Filed taxes in 2007.  <b>Attach 1040 &amp; W-2s</b>
<u>Non-Filer</u> - If not required, per IRS 2007 Instruction Booklet, to file a 2007 federal tax return, list 2007 income sources/amounts and submit a copy of all W-2s.  Employer/ Income Source _____  Employer/ Income Source _____	<input type="checkbox"/> Did not file taxes in 2007.  <b>Attach W-2s</b>	<input type="checkbox"/> Did not file taxes in 2007.  <b>Attach W-2s</b>

**B-2 & B-3: 2007 Untaxed Income and Benefits**

Reference FAFSA Worksheet A for Section B-2 and FAFSA Worksheet B for Section B-3. List untaxed income and benefits received during 2007 only. DO NOT INCLUDE FINANCIAL AID. Complete every item. Enter ZERO even if it does not apply to you.

<b>Section B-2</b> (Reference Worksheet A)	Student/Spouse	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). <b>Do not include food stamps or subsidized housing.</b>	\$	\$
Untaxed Social Security and/or Supplemental Security Income (SSI) received for ALL family members. Report TOTAL.	\$	\$
<b>Section B-3</b> (Reference Worksheet B)	Student/Spouse	Parent(s)
Payments to tax deferred pension/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, 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).	\$	\$
<b>Total</b> Child support received for all children (Do not 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 - line 18	\$	\$
Untaxed portion of IRA distributions from IRS Form 1040 -lines (15a minus 15b) or 1040A -lines (11a minus 11b). Exclude 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 4136 - line 18 (nonfarmers only).	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and/or cash value of benefits received).	\$	\$
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 elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. <i>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, combat pay if you are not a tax filer, or benefits from flexible spending arrangements, e.g., cafeteria plans.</i>	\$	\$
Money received, or money paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$	XXXXXXXXXX

If reported 2007 income has decreased, you may qualify for a special circumstance calculation. Call our office for more information.

<b>Section B-4:</b> (Reference FAFSA Worksheet C)	Student/Spouse	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 (child/children will not be included in household).	\$	\$
Taxable earnings from Federal Work Study or other need based work programs.	\$	\$
Student grant and scholarship aid (in excess of tuition & fees) reported to IRS and on FAFSA.	\$	\$

**Section C: Veteran's Benefits**

What amount of Veteran's benefits will you receive between July 1, 2008 and June 30, 2009? \$ \_\_\_\_\_ per month for \_\_\_\_ months.

**Section D: Required Certification and Signatures**

Check form again for blank lines, which may result in form being returned to you.

I understand that submitting this information has started the verification process. Additional information may be necessary. **I will be prepared to make my first payment, when due, if verification hasn't been completed at that time.** I (we) certify all information shown on this form is complete and correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent signature (One parent whose information is provided on FAFSA) (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent address (street/city/state/zip)

\_\_\_\_\_  
Parent phone

## Guideline to Reporting Household Size Information

**Dependent Students page 1**  
**Independent Students page 2**

Below you will find helpful information about determining your parent(s) household size. Read this information carefully. If you have a situation that is not addressed here and you can not determine your parent(s) household size with these instructions, contact our office at (618) 650-3880 and speak with an advisor for assistance.

### **Household Size Definition for Dependent Students**

Include the people whom your parents will support between July 1<sup>st</sup>, 2008 and June 30<sup>th</sup>, 2009, including:

- **Yourself**
- **Parent(s) and/or stepparent** if your parents are both living and married to each other (not separated), list both. If your parent was widowed and remarried as of the day you signed your FAFSA, list your parent and stepparent. If your parents are divorced or separated, list the parent with whom you lived more during the past 12 months. If you did not live with one parent more than the other (or not at all), list the parent who gave you the most financial support\* during the last 12 months, or during the most recent year that you received financial support from a parent. Also, include the stepparent if parent has remarried.
- **Parents' dependent children** if your parent(s) provides **more than half** of the support\* for any dependent child, even if that person is away at college or not living in your parent(s) home.
- **Other people** if any other person lives with and receives **more than half** of their support\* from your parent(s) and will continue to receive **more than half** of their support\* from your parent(s) from July 1<sup>st</sup>, 2008 to June 30<sup>th</sup>, 2009.

\*Support includes money, gifts, loans, housing, food, clothes, car payments or expenses, medical and dental care, and payment of college costs.

If you are a dependent student, always include yourself, even if you do not live with your parents. Also, always include your parents. *Note: The federal definition of "parents" defines only your custodial parent and their **current** spouse. If your natural parents are separated or divorced, the non-custodial parent is not to be listed in the table, nor are any individuals residing with the non-custodial parent. If your custodial parent is remarried, the stepparent's information must be included or you will not be considered for federal student financial aid.*

*To determine whether to include children in the household size, the "support" test is used because there may be situations in which a parent supports a child who does not live with the parent. In such cases, the parent who provides more than half of the child's support may claim the child in his or her household size. The child need not be claimed on the federal tax return. Household size and tax exemptions are not necessarily the same. Exemptions look at the previous year or tax year and household size refers to the school year for which the student is applying for aid.*

Include anyone in the **immediate** family (your parents' other dependent children) who receive more than 50% support from your parents, even if that person does not reside in the house. For example, a sibling who is over 24 but still receives the majority of his/her support from the parents can be included. Siblings who are dependent (as defined by the FAFSA) as of the date you apply for aid are also included, regardless of whether they receive more than 50% of their support from the parents. You may also include your parents' unborn child, if that child will be born before July 1, 2009 and your parents will provide more than half of the child's support through the end of the 2008-09 award year (June 30, 2009). (If there is a medical determination of a multiple birth, then all expected children can be included.)

Include any other person who resides in the household and receives more than 50% support from the parents, as long as they will continue to reside with your parents and the support is expected to continue through June 30, 2009.

If you live with a relative other than your parent(s), you may report their information on your FAFSA **ONLY** if that relative is your adoptive parent. Dependent students can be considered dependent only on their parents and must report only information from their parent(s) household.

If you live with a girlfriend/boyfriend or anyone else besides your parents, do not use that information for household size. When you are a dependent student, you must report only information from your parent(s) household, even if you do not live there.

## Guideline to Reporting Household Size Information

### Independent Students

Below you will find helpful information about determining your household size. Read this information carefully. If you have a situation that is not addressed here and you cannot determine your household size with these instructions, contact our office at (618) 650-3880 and speak with an advisor for assistance.

#### **Household Size Definition for Independent Students**

Include the people whom you/your spouse will support between July 1<sup>st</sup>, 2008 and June 30<sup>th</sup>, 2009, including:

- **You**
- **Your spouse**, excluding a spouse not living in the household as a result of death, separation, or divorce.
- **Your children**, if they will receive more than half of their support\* from your household between July 1, 2008 and June 30, 2009.
- **Your unborn child**, if that child will be born before July 1, 2009 and your household will provide more than half of the child's support\* from the projected date of birth to the end of the 2008-09 award year (June 30, 2009). (If there is a medical determination of a multiple birth, then all expected children can be included.)
- **Other people**, if they live with you and will receive more than half of their support\* from your household for the entire award year (July 1, 2008 through June 30, 2009).

\*Support includes money, gifts, loans, housing, food, clothes, car payments or expenses, medical and dental care, and payment of college costs.

Always include yourself and your spouse unless your spouse has died, you are divorced, or you are separated. A couple doesn't have to be legally separated. The couple may consider themselves informally separated when one of the partners has left the household for an indefinite period of time and the marriage is severed. Temporary absences for special circumstances such as for business, medical care, school, or military service do not qualify as a separation.

To determine whether to include children in your household size, the "support" test is used because there may be situations in which you support a child who does not live with you (such as having a child whom you support, but lives away at college). In such cases, the parent who provides more than half of the child's support may claim the child in his or her household size. It does not matter which parent claims the child as a dependent for tax purposes.

When you include an unborn child, we may ask you to supply a statement from your physician showing the expected due date of the child. The child must be born before July 1<sup>st</sup>, 2009 and you must provide more than 50% of that child's support from birth until June 30<sup>th</sup>, 2009.

When you include "other people" who are not your spouse or your children, those people must live with you/your spouse AND you/your spouse must provide more than half of their financial support from July 1<sup>st</sup>, 2008 through June 30<sup>th</sup>, 2009). We may ask for income information, as a person with their own source of income may or may not receive more than 50% of their support from you.

## Guide to Reporting Number in College

### **Who qualifies to be counted in the number in college?**

**Dependent Students:** Any person (other than your parents) who is counted in the household and will be attending any term of the academic year at least half time qualifies to be counted. The person must be working toward a degree or certificate leading to a recognized education credential at a postsecondary school eligible to participate in the federal student aid programs. You (the student) need not be enrolled half time to be counted in the number in college. A person included in number in college does not have to physically live in your parents household. A household member who lives away at college but still receives more than half of their support from your parents should be included in number in college.

**Independent Students:** Any person who is counted in your household and will be attending any term of the academic year at least half time qualifies to be counted. The person must be working toward a degree or certificate leading to a recognized education credential at a postsecondary school eligible to participate in the federal student aid programs.