

**2011-12 VERIFICATION WORKSHEET  
FOR FEDERAL STUDENT LOAN APPLICANTS**

Name: \_\_\_\_\_ WSU ID: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_ Year in School: \_\_\_\_\_

**A. FAMILY MEMBERS – Please list the following (you may attach a separate page if necessary):**

- Yourself, and your spouse ,(if married)
- Your children, if you will provide more than half of their support from July 1, 2011 through June 30, 2012.
- Other people currently living with you for whom you provide, and will continue to provide, more than half of their support from July 1, 2011 through June 30, 2012.
- If any household member (except parents) will be enrolled at least half-time, in a degree or certificate program, between July 01, 2011 and June 30, 2012, list the name of the college or university.

Names of Members in the Household	Age	Relationship to You	Name of College or University
1.		SELF	Wayne State University - School of Medicine
2.			
3.			
4.			
5.			

**B. 2010 FEDERAL TAX RETURNS and INCOME INFORMATION - Please check all that apply:**

- Check here if you, and your spouse (if married) transferred your 2010 Federal Income Tax Return information onto your FAFSA from the new **IRS Data Retrieval System**, have **NOT** made any changes, and do not plan to make changes. If this applies, **you do not need to attach copies of your tax returns.**
- Check here if you and your spouse (if married) **did not transfer** your 2010 Federal Income Tax Return information onto your FAFSA from the new **IRS Data Retrieval System**. Attach a **signed** copy of your tax return and all schedules.

If the tax return was filed without making copies, an official **IRS Tax Transcript** can be ordered from the IRS by calling 1-800-829-1040. Once you receive the transcript make sure your **sign** it, and make a copy to submit to our office.

**Non-Tax Filers:** If you, and/or your spouse **will not file because you are not required to file** a 2010 Federal Income Tax Return, please check the appropriate box and provide source and amount of income:

- Student non-filer**       **Spouse non-filer**

**Non-Tax Filers** who worked in 2010 must list their employer(s), and income received in 2010 (Use the W-2(s) form or other earnings statement if available, and also submit copies of these documents).

Full Name	Relationship to You	Source of Income for 2010	Amount
			\$
			\$

**C. SUPPLEMENTAL INFORMATION: To confirm answers from FAFSA Question 43: STUDENT'S 2010 ADDITIONAL FINANCIAL INFORMATION (Please do not leave any item blank; enter "0" if amount is zero.)**

Student/Spouse	
\$	a. Education Credits (Lifetime Learning or American Opportunity tax credits) from IRS Form 1040 – Line 49 or 1040A – Line 31.
	b. Making Work Pay Credit from IRS Form 1040 – Line 63; 1040A – Line 40; 1040EZ – 8.
\$	c. Child Support <b>paid</b> because of divorce or separation, or as a result of a legal requirement. (Do not include support for children in your household, as reported in question 94.)
\$	d. Taxable earnings from need-based employment programs, such as Federal Work-Study, and need-based employment portions of fellowships and assistantships.
\$	e. Taxable 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 and scholarship portions of fellowships and assistantships.
\$	f. Combat pay or Special Combat pay. Enter only the amount that was <b>taxable</b> and included in your adjusted gross income. (Do not enter untaxed combat pay.)
\$	g. Earnings from work under a cooperative education program offered by a college.
<b>Total:</b>	
\$	

**To confirm answers from FAFSA Question 44: STUDENT'S 2010 UNTAXED INCOME INFORMATION (Please do not leave any item blank; enter "0" if amount is zero.)**

Student/Spouse	
\$	a. Payments to tax-deferred Pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, for Codes D, E, F, G, H, and S.
\$	b. 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.
\$	c. Child Support you <b>received</b> for all children. (Do not include foster care or adoption payments.)
\$	d. Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.
\$	e. Untaxed portions 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.
\$	f. 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.
\$	g. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). <b>Do not include</b> the value of on-base military housing or the value of a basic military allowance for housing.
\$	h. Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.
\$	i. Any other untaxed income not reported elsewhere, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040 – line 67. <b>Do not include</b> student aid, Earned Income Credit, Child Tax Credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, benefits from flexible spending arrangements such as cafeteria plans, foreign income exclusion or credit for federal tax on special fuels.
\$	j. Money received, or paid on your <u>behalf</u> , (e.g., bills) not reported elsewhere on this form.
<b>Total:</b>	
\$	

**NOTE:** By signing this worksheet, I (we) certify that all information reported is complete and correct. You must sign this form. (If you are married, your spouse's signature is optional.) **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

\_\_\_\_\_  
**Student Signature** Date

\_\_\_\_\_  
**Spouse Signature (Optional)** Date

**Return this form with all documents attached to:**  
Wayne State University School of Medicine  
Office of Student Financial Aid  
Mazurek Medical Education Commons  
320 E. Canfield—Suite 317, Detroit, MI 48201  
Ph: 313-577-1039 Fax: 313-993-1342

## 2011-12 VERIFICATION WORKSHEET INSTRUCTIONS FOR FEDERAL STUDENT LOAN APPLICANTS

**Your Financial Aid Application** was selected for the Verification review process by the U.S. Department of Education. The Office of Student Financial Aid (OSFA) at the School of Medicine (SoM) will be comparing information from your 2011-12 Free Application for Federal Student Aid (FAFSA) with the information provided on your Verification Worksheet and supporting 2010 income documents. Please follow the instructions below and return all requested documents to our office via drop-off, mail, email, or fax. Thank You.

### Avoid Verification Processing Delays

- Please submit all documents at the same time, within 14 business days of request.
- Print your name and 9-digit WSU ID number (found on your WSU One Card) on each document.
- **You must sign** the Verification Worksheet. If submitting a 2010 Federal Income Tax Return, it must be signed by you or your tax preparer.
- Submit legible copies of any income documents; do not submit your originals.
- Monitor your document requirements and financial aid status on WSU Pipeline: <http://pipeline.wayne.edu>.

### What You Must Do

1. Complete both pages of the Verification Worksheet and **Sign** page 2. Do not leave any section blank or incomplete. Enter "0" where the answer is zero in appropriate fields instead of leaving blank.
2. Determine if you need to submit your (and your spouse if married) **2010 Federal Income Tax Return** with this Verification Worksheet:
  - a. **Yes**, submit a **signed** copy of your 2010 Federal Income Tax Return if:
    - i. you did not transfer your tax information onto the FAFSA from the new **IRS Data Retrieval System**. Include any Tax Schedules that were filed with the return. You will see outstanding requirements for these needed items on Pipeline.
  - b. **No**, you do not need to submit your 2010 Federal Income Tax Return if either:
    - i. you transferred the 2010 Federal Income Tax Return information onto your FAFSA from the new **IRS Data Retrieval System**, have not made any changes since then, and no changes are planned. (**Note:** The request for the tax return will be waived on Pipeline.)  
- OR -
    - ii. you (and your spouse if married) are not required to file a 2010 Federal Income Tax Return. Check the appropriate box in Section B on the Verification Worksheet. (**Note:** The request for the tax return will be waived on Pipeline.)
3. **Verification Process Deadlines:**  
You must complete all Verification requirements before final eligibility for Federal Student Loans can be determined. We strongly recommend that all documents be submitted within 14 days of receipt of the Verification notice, or by the **priority deadline of April 30, 2011** (whichever date is earlier).
4. **Submit all documents via drop-off, mail, fax, or email. If you have questions or concerns please contact us.**

Office of Student Financial Aid  
Mazurek Education Commons  
320 E. Canfield, Suite 317, Detroit, MI 48201  
EMAIL: [finaidmed@wayne.edu](mailto:finaidmed@wayne.edu)  
PHONE: 313-577-1039  
FAX: 313-993-1342