

Independent Verification Worksheet, page 2

****IMPORTANT CHANGE IN FEDERAL VERIFICATION POLICY****

IRS Forms 1040, 1040A, and 1040EZ are no longer acceptable forms of documentation. Only a U.S. Income Tax Transcript is an acceptable form of documentation.

To request a U.S. Income Tax Transcript see accompanying "IRS Tax Return Transcript Request Process" instructions.

C. Student's Tax Transcript and Income Information (all applicants) *Check only one line below.*

I submitted my 2011 U.S. Income Tax Return to the IRS. The tax information was reported on the FAFSA using the IRS Data Retrieval Process.

If you have not made corrections to your FAFSA since filing your tax return, Belhaven University does not need a copy of your 2011 tax transcript. See Section E for conditions when you must submit a U.S. Income Tax Transcript.

I will submit my 2011 tax returns to the IRS at a future date.

If an extension was filed, submit a copy of the extension request.

I am not required to file a 2011 U.S. Income Tax Return to the IRS.

If you earned income (this includes work-study), but not enough to require you to submit a 2011 U.S. Income Tax Return to the IRS, submit a copy of all of your 2011 W-2's. To request a copy of W-2's contact your employer(s).

If you and your spouse (if applicable) showed no or a minimal amount of income in 2011, you will need to submit a detailed description of the other sources of income you and/or your spouse received.

D. Spouse's Tax Transcript and Income Information (disregard if not married or married filing jointly)

Complete this section if married and filing separately. *Check only one line below.*

My spouse submitted a 2011 U.S. Income Tax Return to the IRS. The tax information was reported on the FAFSA using the IRS Data Retrieval Process.

If you have filed separately, Belhaven will need a copy of your spouse's 2011 tax transcript.

My spouse will submit a 2011 tax return to the IRS at a future date.

If an extension was filed, submit a copy of the extension request.

My spouse is not required to file a 2011 U.S. Income Tax Return to the IRS.

If your spouse earned income, but not enough to require him or her to submit a 2011 U.S. Income Tax Return to the IRS, submit a copy of all your spouse's 2011 W-2's. To receive a copy of W-2's contact your employer(s).

E. Conditions Requiring a U.S. Income Tax Transcript

If you used the IRS Data Retrieval Process when you completed your FAFSA, Belhaven University does not need a copy of your 2011 U.S. Federal Income Tax Transcript. Belhaven University will need a copy of your 2011 U.S. Federal Income Tax Transcript if at least one of the follow conditions applies.

1. When the applicant (or parent) did not use the IRS Data Retrieval Process – either at initial FAFSA filing or through the FAFSA on the web correction process
2. When information included on the FAFSA using the IRS Data Retrieval Process was changed after it was retrieved
3. When a married independent applicant and spouse filed separate tax returns
4. When the parents of a dependent student filed separate tax returns
5. When an applicant or applicant's parent had a change in marital status after the end of the tax year on December 31, 2011
6. When anyone (applicant, parent or spouse) who has tax information reported on the FAFSA files an amended tax return

F. Questions *These questions must be answered before your verification can be completed.*

Did you or your spouse receive food stamps? Yes No

Did you or your spouse pay child support? Give the amount paid in 2011. _____ you paid _____ your spouse paid _____N/A

G. Sign this worksheet

Each person signing this worksheet certifies that all the information reported on it is complete and correct. If married, the spouse's signature is optional.

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

Student Date

Spouse Date

Belhaven University Office of Student Financial Planning

1500 Peachtree St. Box 159

Jackson, MS 39202

Fax: 601-353-0701

Email: studentaid@belhaven.edu

Phone: 601-968-5933 or 1-800-960-5940 x8220

Do not send this worksheet to the Department of Education. Submit this worksheet and supporting financial documents to the Belhaven University Student Financial Planning Office.