



## 2020–2021 Aggregate Verification Worksheet

### V5-Independent Student

Your 2020–2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called “Verification”. The Financial Aid Office at your college must compare information from your FAFSA with information you provide on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected and your Financial Aid Office could require additional documentation. You will not receive federal financial aid until all verification requirements are met and the necessary corrections made.

#### What You Should Do

1. If you (or your spouse, if you are married) are tax filers, obtain a **2018 IRS Tax Return Transcript** for yourself and/or your spouse. Request an IRS Tax Return Transcript online at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or by phone at 1-800-908-9946. Make sure you select an IRS Tax Return Transcript and NOT the IRS Tax Account Transcript. Be sure to specify **tax year 2018** when making your request. In place of the transcript, the Financial Aid Office can accept a complete signed copy of a preparer’s **2018 Federal Income Tax Return (Form 1040 with all schedules)** that was submitted to the IRS. **Important Note:** If you used the IRS Data Retrieval Tool to transfer your 2018 income data into your FAFSA, you may not have to submit the IRS Tax Return Transcript.
2. If you (or your spouse) had income earned from work in 2018, but did not and were not required to file a tax return, you both must provide a **2018 Verification of Non-Filing Letter** dated on or after October 1, 2019, and all **W-2 forms** for tax year 2018 issued to you by your employers. Request a Verification of Non-Filing Letter at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or by phone at 1-800-908-9946.
3. Complete Sections A-C of this worksheet – you must sign the Section D certification on page 2 of the worksheet. Collect the documents required for Section E on page 3 but do **NOT** complete that page in advance.
4. Submit the completed worksheet, tax return transcript(s) and any other required documents to the Financial Aid Office at your college. You will complete Section E in person at that time.

#### A. Student’s Information

Student’s Last Name	First Name	M.I.	Student’s Social Security Number
Student’s Street Address (include apt. no.)		Student’s CUNYfirst ID / Empl ID	
City, State, Zip Code		Student’s Date of Birth	
Student’s Phone Number (include area code)		Student’s Email Address	

#### B. Student’s Household Information

List the people you will support between July 1, 2020 and June 30, 2021. Include:

- Yourself and your spouse (if you are married)
- Your other children if you (or your spouse) provide more than half of their support, even if they don’t live with you.
- Other people if they now live with you, and you now provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.

Write the name of the college below for any household member who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2020 and June 30, 2021.

*If more space is needed, attach a separate page with student’s name and the last 4 digits of student’s SSN at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Example: Jane Smith</i>	<i>18</i>	<i>Sister</i>	<i>State University</i>	<i>Yes</i>
		Self		

<b>Student Name:</b>	<b>Student SSN: XXX-XX- _____</b>
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**C. Student/Spouse’s Income Information to Be Verified**

*NOTE: Notify your Financial Aid Office if your or your spouse had a change in marital status after December 31, 2018. If you or your spouse filed an amended 2018 IRS tax return, you may be required to submit additional documentation to the Financial Aid Office at your college.*

**Check the appropriate box (or boxes):**

- I used the IRS Data Retrieval Tool in FAFSA-on-the-Web to transfer 2018 IRS income tax information into the FAFSA. *[The income tax information from the FAFSA will be used to complete the verification process.]*
- I did not (or could not) transfer my/our 2018 income information to the FAFSA using the IRS Data Retrieval Tool. I/we have attached a copy to this worksheet of my/our **2018 IRS Tax Return Transcript** or a signed preparer’s copy of the **2018 Federal Income Tax Return (Form 1040 with all schedules)** that was submitted to the IRS. *[Note: if you filed a joint tax return, but reported your marital status on the FAFSA as separated, divorced or widowed, you must include copies of all IRS Form W-2s with the tax transcript.]*
- I/we have not filed (and are not required to file) a 2018 federal income tax return and I/we had no income earned from work in 2018. I/we have each attached a **2018 Verification of Non-Filing Letter** to this worksheet.
- I/we have not filed (and are not required to file) a 2018 federal income tax return but I/we had income earned from work in 2018 as listed below. I/we have each attached a **2018 Verification of Non-Filing Letter** to this worksheet. *[List every employer and the amounts earned in 2018, even if an IRS Form W-2 was not issued. You must attach copies of all 2018 IRS Forms W-2 that were issued to you by your employers.]*

*Only complete this grid if you are a non-tax filer that had earned income in 2018. If more space is needed, attach a separate page with student’s name and the last 4 digits of student’s SSN at the top.*

Employer’s Name	2018 Amount Earned	2018 IRS Form W2 Attached?
<i>Example: ABC Company</i>	\$1367.75	Yes

**D. Certification and Signatures**

I/we certify that all the information reported on this worksheet is complete and correct. I/we understand that if we purposely give false or misleading information, I/we could be fined, jailed, or both. *[If student is married, the spouse’s signature is optional.]*

<b>Student Signature</b>	<b>Date</b>
<b>Spouse Signature</b>	<b>Date</b>

***Do not mail this worksheet to the U.S. Department of Education.***

***Submit this worksheet to the Financial Aid Office at your college.***

***You should make a copy of this worksheet and all submitted documents for your records.***

***You must complete Section F on page 3 of this worksheet IN PERSON at the Financial Aid Office at your college.***

<b>Student Name:</b> _____	<b>Student SSN: XXX-XX-</b> _____
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**E. Identity Verification and Statement of Educational Purpose**

**Do not complete this page in advance. You must complete and sign this page IN PERSON at the Financial Aid Office at your college.**

You have been selected by the U.S. Department of Education to verify your identity and educational plans. You must appear in person at the Financial Aid Office at your college and present a piece of valid government-issued identification to a financial aid representative. The representative will review and copy this piece of identification which will be maintained in your student file.

**Statement of Educational Purpose**

I certify that I, \_\_\_\_\_  
(Print Name)

am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending

\_\_\_\_\_ for 2020-2021.  
(Name of CUNY Institution Attending)

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**OFFICE USE ONLY- DO NOT WRITE BELOW**

**1. Proof of Identity**

The above-named student has presented valid government-issued photo identification such as a state driver's license, non-driver's license or passport which verifies his or her identity.

NOTE: An unexpired valid government-issued photo identification is one issued by the U.S. government, any of the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, a federally recognized American Indian and Alaska Native Tribe, or other U.S. territory as outlined in the Federal Register.

FA Certifying Officer's Signature	Date Received	Type of Valid ID Collected

**2. Completion of High School or the Equivalent**

The above-named student has submitted a final high school transcript or other acceptable documentation to the appropriate CUNY office that shows evidence of graduation from an accredited high school or educational institution, state-issued general education equivalency (GED), or evidence of home schooling.

FA Certifying Officer's Signature	Date Received