



LEHMAN
COLLEGE

Office of Financial Aid

IMPORTANT NEWS

FILING YOUR 2012-13 FINANCIAL AID APPLICATIONS

The federal government has introduced a change in the way you and your family reports information on your FAFSA. The U.S. Department of Education has partnered with the Internal Revenue Service to allow you and your parents to transfer your 2011 income information directly from IRS records to your online application. Using this option when you complete your FAFSA should allow you to file an application with fewer mistakes.

The following information covers several topics you should review before you apply for financial aid for the Summer 2012, Fall 2012 & Spring 2013 semesters.

-  **Filing Your FAFSA On the Web (FOTW)**

-  **Using the IRS Data Retrieval Tool**

-  **What Is Verification & How Does It Affect You?**

-  **How To Request a Free IRS Tax Return Transcript**

-  **Applying for New York State Aid**

-  **How Can I Get a CUNY Scholar Support Card?**



Filing Your FAFSA-on-the-Web (FOTW)

File 2011 Income Tax Returns

- You & your spouse (if married) or parents (if dependent) should file 2011 tax returns electronically, if possible
- Wait 2-3 weeks, then proceed with the FAFSA filing process outlined below
- If you are not required to file income taxes, you may skip this step

Collect these items and documents

- Your social security number
- Social security numbers and dates of birth for your parents (if dependent)
- Copies of 2011 tax returns (with W-2s) for you and your spouse (if married) or parents (if dependent) to use for reference when using IRS Data Retrieval option (outlined below)
- Bank, stock, real estate & business records (if applicable) for you and your parents
- Your alien registration number (if you are not a U.S. citizen)

Get Federal PINs for you & one of your parents (if dependent)

- Request Federal PINs at: <http://www.pin.ed.gov>
- You will receive and be able to use you PINs immediately
- PINs are your and your parents' electronic signatures for web applications
- If you and a parent already have PINs, use them to sign your application — you can use the same PIN every year

START HERE
GO FURTHER
FEDERAL STUDENT AID

Federal Student Aid PIN

English | Español

Apply For A PIN
Check PIN Status
Request A Duplicate PIN
Access My PIN E-mail
Change My PIN
Update My Personal Information
Disable My PIN
Reestablish My PIN
Activate My PIN

Helpful Links
Student Aid on the Web
Information you will need to receive aid for school. [Go »](#)
Links to Federal Student Aid Electronic Services
FAFSA on the Web

Welcome to the Federal Student Aid PIN Web site

This Web site is your source of information for the Federal Student Aid PIN.

Your PIN can be used each year to electronically apply for federal student aid and to access your Federal Student Aid records online. If you receive a PIN, you agree not to share it with anyone. Your PIN serves as your electronic signature and provides access to your personal records, so you should never give your PIN to anyone, including commercial services that offer to help you complete your FAFSA. Be sure to keep your PIN in a safe place.

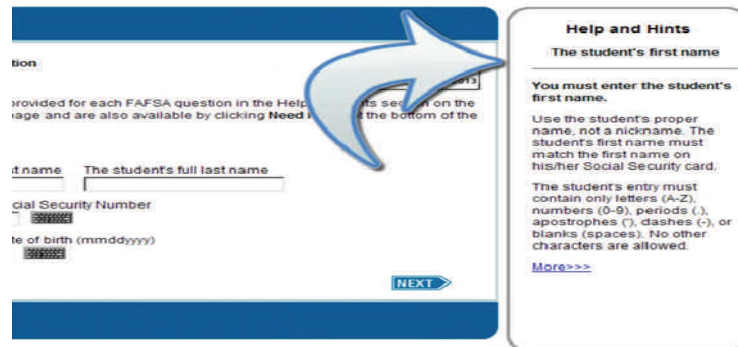
Apply For A PIN
The PIN Application is for students and parents who want to apply for a Federal Student Aid PIN.
[APPLY NOW](#)

www.pin.ed.gov

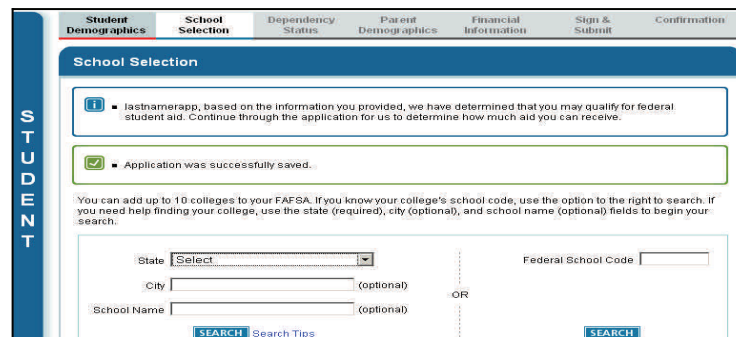
Site Last Updated: Wednesday, September 28, 2011

File your FAFSA on the Web (FOTW) at: <http://www.fafsa.gov>

- The FAFSA is used to apply for Federal Pell Grant, SEOG, Work-Study and Student Loans
- Select "Start Here" from the FAFSA homepage & choose "**2012-2013 FAFSA**" from the application choices
- When prompted, sign the application with your PIN
- **If eligible, use the IRS Data Retrieval option** to import 2011 IRS Income Tax data to the FAFSA (see next page for more information)
- FOTW gives assistance with every question with its "Help & Hints" section on the right hand side of the website



- Under the School Selection Option, enter Lehman's Federal School Code: **007022**



- When finished, print your FAFSA data and the Confirmation page as proof that you submitted your FAFSA successfully
- You can download your application results (called a Student Aid Report or SAR) in 3-5 days from <http://www.fafsa.gov>.



Using the IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows you and your parents to transfer tax information from IRS tax records directly to your FAFSA. If you & your parents have indicated on your FAFSA that you have already filed your 2011 taxes, you will be given the option to use this tool when completing the financial information portion of the application. If you choose not to use this option, or use the option but manually update one of the fields, you may be selected for verification and have to submit additional information to the Financial Aid Office after your application is processed.

Please Note:

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after your return is filed.
- Data from paper tax returns will be available in 6-8 weeks.
- There are 2 separate Financial Information sections on the FAFSA. You will use this tool for the Student Financial Information section and your parents will use the tool for the Parent Financial Information section.

To use this option you must:

- Have a federal tax return filed with the IRS
- Have a valid social security number
- Have a Federal Aid Personal Identification Number (PIN)

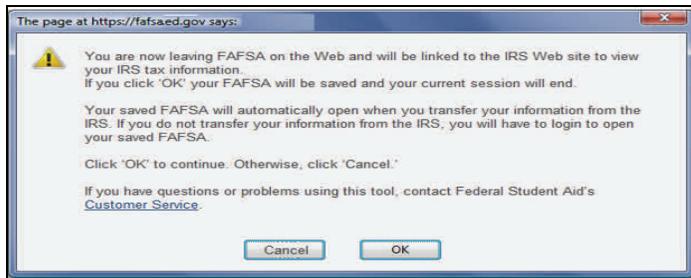
FOTW determines if you are eligible to use the IRS Data Retrieval Tool based on your reported tax filing status.

The screenshot shows the FAFSA Parent section interface. On the left, a vertical purple bar contains the word "PARENT". The main content area has a green header with a checkmark and the text "Application was successfully saved." Below this, a question asks: "For 2011, have your parents completed their IRS income tax return or another tax return?" with a dropdown menu set to "Already completed". A green icon with a question mark is followed by the text: "You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS." Below this, it says "Check all that apply or check None of the above." and lists five radio button options: "You, the parents, filed as Married Filing Separately", "You, the parents, filed as Head of Household", "You, the parents, filed an amended tax return", "You, the parents, filed a Puerto Rican or foreign tax return", and "You, the parents, recently filed taxes". A "None of the above" option is at the bottom. Navigation buttons "PREVIOUS" and "NEXT" are at the bottom center. A footer bar contains "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT". On the right, a "Help and Hints" box titled "Parents Filed 2011 Income Tax Return? Question 79" explains the question. At the bottom left, it says "Site Last Updated: Sunday, December 18, 2011" and at the bottom right, "Download Adobe Reader".

Some tax filers may not be able to use the IRS Data Retrieval Tool and will have to enter their data from their own tax records. You or your parents will not be offered this option if:

- Your marital status changed after December 31, 2011
- You or they filed "married filing separately"
- You or they indicated "married" on the FAFSA but filed "head of household" on the tax return
- You or they filed an amended return
- You or they filed a foreign tax return

If eligible to use the tool, you will be transferred to the IRS Website. FOTW will notify you that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information.



On the IRS Web site, you will be prompted to enter information as it appears on your tax return. It is important that you complete this section exactly as it appears on your tax return or your information may not match with IRS records and the data retrieval may not go through.

Internal Revenue Service
United States Department of the Treasury

Log Out | Help
003 Web Page - Input Shared Secrets

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information as it appears on your **Federal Income Tax Return** Required fields *

First Name *	Joe
Last Name *	Smith
Social Security Number *	**-**- 6789
Date of Birth *	01 / 04 / 1990
Address * ?	
P.O. Box and/or Street Address	
Apt. Number (Required if it appears on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
ZIP Code *	
Filing Status *	Select One

Submit

Once the IRS has authenticated your identity, your IRS tax information will display. You may then choose to transfer your information from the IRS into your FAFSA by checking the "Transfer My Tax Information into the FAFSA" and clicking "Transfer Now" button (see below).

Return to FAFSA | Log Out | Help

Parent <YYYY> Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

My Tax Information	FAFSA Question Numbers
Tax Year	
Name (s)	<Joe & Jane>
Social Security Number	<###-##-####>
Filing Status	<Married-Filed Joint Return>
Type of Tax Return Filed	<1040> Question <##> on the FAFSA
Adjusted Gross Income	<\$126,721> Question <##> on the FAFSA
Income Tax	<\$31,400> Question <##> on the FAFSA
IRS Exemptions	<5> Question <##> on the FAFSA
Education Credits	<\$2,500> Question <##> on the FAFSA
IRA Deductions and Payments	<\$2,500> Question <##> on the FAFSA
Tax-Exempt Interest Income	<\$2,500> Question <##> on the FAFSA
Untaxed IRA Distributions	<-\$2,500> Question <##> on the FAFSA
Untaxed Pensions	<-\$2,500> Question <##> on the FAFSA

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA ?

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

[Transfer Now](#) ?

Do Not Transfer My Tax Information and Return to the FAFSA ?

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.

[Do Not Transfer](#) ?

After you have transferred your data, you will be returned to the FOTW website to finish your application. Make sure not to change any of the financial data that was imported from the IRS Website. Remember that both you and your parents (if applicable) will need to go through a separate authentication process when filling out the Student Financial Information & the Parent Financial Information sections of the FAFSA.



What Is Verification & How Does It Affect You?

The federal government uses a process called verification to help determine the correctness of the financial information on your FAFSA. When applications are selected for verification, the Financial Aid Office must collect certain documents from you and your family and match them against the information you provided on your FAFSA. If your application needs to be verified, the Financial Aid Office will send you a letter and an e-mail asking you to provide documentation of your application information and complete a "Verification Worksheet". You will have to submit the requested items of documentation before you receive any payments of federal financial aid.

Tax Filers

If you or your parents did not or could not use the IRS Data Retrieval option when you completed your FAFSA, or manually changed any information transferred from IRS records to your FAFSA, you will have to submit an IRS Tax Transcript as one of the required documents in order to complete verification. We can no longer accept copies of tax returns that you or your tax preparer completed. Learn how to obtain a free tax transcript on p. 9.



2012-13 VERIFICATION WORKSHEET Federal Student Aid Programs

What is Verification?
Your application was selected by the U.S. Department of Education for review in a process called "verification". The Office of Financial Aid must compare information from your FAFSA with information you provide on this worksheet and other documents. If there are differences between your application information and the documents you submit, your application may need to be reprocessed. The Office of Financial Aid cannot make any federal financial aid payments available to you or process a student loan request until all verification requirements have been met and the necessary corrections have been made.

- What You Should Do:**
1. Obtain a 2011 Federal IRS Tax Return Transcript and W-2 forms for yourself, your spouse (if married) or your parent(s)/step-parent (if dependent). The U.S. Department of Education no longer allows a preparer's copy of tax returns to satisfy the Verification Requirements. You may order a **TAX RETURN TRANSCRIPT** from the Internal Revenue Service online at www.irs.gov or by phone at 1-800-908-9946. Note: If you used the IRS Data Retrieval tool to transfer your IRS income data to your FAFSA, you may not have to submit the IRS Tax Return Transcript.
 2. Fill in and sign this worksheet - you and at least one parent (if dependent) must sign the certification (SECTION D) on page 2 of the worksheet.
 3. Review your Student Aid Request (SAR), information request letters from the Financial Aid Office and the second page of this worksheet to see if you need to submit other documentation (such as default clearance letter, citizenship documentation, proof of receipt of food stamps/INAP, proof of child support paid, social security card, etc.)
 4. Submit the completed worksheet, tax return transcripts, and any other documents to the Office of Financial Aid.
 5. After a financial aid representative reviews your information, you could be asked to submit additional documentation. When all the information has been reviewed and any necessary corrections made, you will be notified about your financial aid awards and payments.

A. STUDENT AND FAMILY INFORMATION

Last name	First name	M.I.	Social security number
Address (include apt. #)			Date of birth
City	State	ZIP	Phone number (include area code)

INDEPENDENT STUDENTS: List the people that you (and your spouse) will support between July 1, 2012 and June 30, 2013. Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2012 to June 30, 2013.

DEPENDENT STUDENTS: List the people that your parents will support between July 1, 2012 and June 30, 2013. Include yourself, your parents, and your parent's other children if (a) your parents provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. Include other people only if they now live with your parents and receive, and will continue to receive, more than half their support from them between July 1, 2012 and June 30, 2013.

Write the names of all family members including yourself. Also write the name of the college for any family member who will be attending college at least half-time between July 1, 2012 and June 30, 2013 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

NAME	AGE	RELATIONSHIP	COLLEGE
		SELF	XXXX

Continued on other side

Internal Revenue Service United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Request Date:
Response Date:
Tracking Number:

Tax Return Transcript
SSN Provided:
Tax Period Ending:

The following items reflect the amount as shown on the return (FR), and the amount as adjusted (FC), if applicable. They do not show subsequent activity on the account.

SSN:
SPouse SSN:

NAME(S) SHOWN ON RETURN: _____
ADDRESS: _____

FILING STATUS: _____ Married Filing Joint
FROM NUMBER: _____
CYCLE POSTED: _____
RECEIVED DATE: _____
REMITTANCE: _____
EXEMPTION NUMBER: _____
DEPENDENT 1 NAME CTRL: _____
DEPENDENT 2 NAME CTRL: _____
DEPENDENT 3 NAME CTRL: _____
DEPENDENT 4 NAME CTRL: _____
DEPENDENT 5 NAME CTRL: _____
DEPENDENT 6 NAME CTRL: _____
DEPENDENT 7 NAME CTRL: _____
DEPENDENT 8 NAME CTRL: _____
PREPARER SSN: _____
PREPARER EIN: _____

Income

WAGES, SALARIES, TIPS, ETC.	.....
TAXABLE INTEREST INCOME (SCH B)	.....
TAX-EXEMPT INTEREST	.....
ORDINARY DIVIDEND INCOME (SCH B)	.....
QUALIFIED DIVIDENDS	.....
REFUNDS OF STATE/LOCAL TAXES	.....
ALIMONY RECEIVED	.....
BUSINESS INCOME OR LOSS (Schedule C)	.....
BUSINESS INCOME OR LOSS (SCH C PER COMPUTER)	.....
CAPITAL GAIN OR LOSS (Schedule D)	.....
CAPITAL GAIN OR LOSS (SCH D PER COMPUTER)	.....
OTHER GAINS OR LOSSES (Form 4797)	.....
TOTAL IRA DISTRIBUTIONS	.....
TAXABLE IRA DISTRIBUTIONS	.....
TOTAL PENSIONS AND ANNUITIES	.....
TAXABLE PENSION/ANNUITY AMOUNT	.....
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E)	.....
RENT/ROYALTY INCOME/LOSS PER COMPUTER	.....
ESTATE/TRUST INCOME/LOSS PER COMPUTER	.....
PARTNERSHIP/CO-OP INCOME/LOSS PER COMPUTER	.....
FARM INCOME OR LOSS (Schedule F)	.....
FARM INCOME OR LOSS (Schedule F) PER COMPUTER	.....
UNEMPLOYMENT COMPENSATION	.....
TOTAL SOCIAL SECURITY BENEFITS	.....

Non-Tax Filers

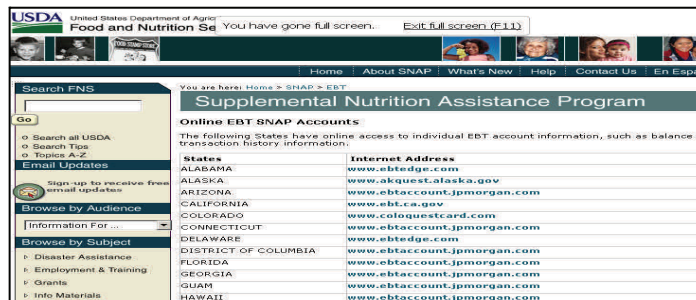
If you have earnings from work but did not and were not required to file a 2011 federal income tax return, document this income by attaching all W-2 forms and/or 1099s from all sources of employment to the Verification Worksheet.

* Control number		OMB No. 1545-0046		This information is being reported to the Federal Income Tax Service. You are required to file a tax return if you are an individual or other structure may be required to file a tax return in certain cases. See instructions for more details.			
b. Employer identification number		1 Wages, tips, other compensation		2 Federal income tax withheld			
c. Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld			
		5 Medicare wages and tips		6 Medicare tax withheld			
		7 Social security tips		8 Allocated tips			
d. Employer's social security number		9 Advance EIC payment		10 Dependent care benefits			
e. Employer's first name and initial Last name		11 Nonqualified plans		12a See instructions for box 12			
		13 Health, dental, vision		12b			
		14 Other		12c			
f. Employer's address and ZIP code				12d			
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.	
						19 Local income tax	
						20 Locally imposed	

W-2 Wage and Tax Statement Department of the Treasury—Internal Revenue Service

Food Stamp Recipients

If you reported that an individual in your household received Food Stamps/SNAP in 2010 or 2011, you must prove that this benefit was received. You can submit a copy of the recipient's benefit history. Your SNAP Online Benefit History can be accessed at <http://www.fns.usda.gov/snap/ebt/online-states.htm>.



Other Verification Items

Depending on your individual circumstances, you may be asked to confirm or document the correctness of additional FAFSA data items before your application can be finalized. If you are required to submit additional information for verification, you will receive notification from the Financial Aid Office.



How To Request a Free IRS Tax Return Transcript

If you, your spouse (if married) or your parents (if dependent) need to document your taxable income to fulfill verification requirements, you can request an IRS Tax Return Transcript free of charge. Remember that we can no longer accept copies of the tax returns that you or your tax preparer completed. You may only submit documents that come directly from the IRS to complete verification of your tax return information. There are two ways to request a tax transcript from the IRS.

Online Request

Go to the IRS Web site at www.irs.gov. Click "Order a Tax Return or Account Transcript" on the homepage and follow the steps to order your tax transcript. There is a validation process that involves entering the tax filer's social security number, date of birth, street address, and zip or postal code. If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request in 5-10 days from the date the online request was submitted.

The screenshot shows the IRS website homepage. At the top, there is a navigation bar with links for "Change Text Size", "Contact IRS", "About IRS", "Español", and "Other Languages". Below this is a search bar with a magnifying glass icon and a "SEARCH" button. A secondary navigation bar lists categories: "Individuals", "Businesses", "Charities & Non-Profits", "Government Entities", "Tax Professionals", "Retirement Plans Community", and "Tax Exempt Bond Community". The main content area features three promotional tiles: "I need to pay my tax bill", "I've got a question", and "I need to get or renew my PTIN". Below these tiles are four columns of links: "Forms & Pubs" (including W-9, 941, W-4, 1040, 941 Inst, 1099MISC, W-2, 4506-T, Tax Table, 1040 Inst), "Hot Topics" (including Sign up for a PTIN, Heavy Highway Tax Update, Affordable Care Act Tax Provisions, Airline Ticket Taxes Reinstated), "Tools" (including Check on Your Refund, Order a Tax Return or Account Transcript, Apply for an Employer Identification Number (EIN) Online), and "Filing & Payment" (including where's refund?, freefile, e-file, and EFTPS). The "Order a Tax Return or Account Transcript" link in the Tools section is circled in red.

Telephone Request

Call the IRS at 1-800-908-9946. Follow the prompts to enter required information and select IRS Tax Return Transcript option. If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days from the time the IRS receives the request.



Applying for New York State Aid

Tuition Assistance Program (TAP)

When you have finished filing FOTW, click on "Optional Feature — Start your state application" located on the FAFSA Confirmation page to link to New York State's TAP-On-the-Web (TOTW) application. Note: if you are not a New York State resident, this option will not be available to you. TAP gives eligible students full-time and part-time tuition awards to supplement any federal student aid you may be receiving.

The screenshot shows the FAFSA Confirmation page for the 2011-2012 year. At the top left is the "Federal Student Aid FAFSA" logo. To the right, a box displays the "Confirmation Number: F 052000664 06 04/14/2010 09:48:22" and "Data Release Number (DRN): 4279". Below the year "2011-2012", a message reads: "Congratulations, Andrea! Your FAFSA was successfully submitted. You should print this page for your records." A teal callout box with an arrow points to the "Optional Feature - Start your state application" link, containing the text: "New York residents planning to attend a New York school should look for this link". Below this, two other optional features are listed: "Optional Feature - Transfer your parent's data into another FAFSA" and "Optional Feature - Start your state application - Click here if you want to apply for New York state-based financial aid (e.g. TAP)".

- Review and correct the pre-printed answers on your TOTW application & answer any questions that are missing.
- Your federal PIN serves as your signature for the TOTW application.
- If you (or your parents) did not use a PIN to sign your FOTW application, your FAFSA signature page satisfies the TAP signature requirement.
- Lehman's TAP School Code is **1412**
- If you did not complete the TOTW application when you filed your FAFSA, you will be sent an email reminder to file your TOTW application at: <http://www.hesc.org>.
- You will receive an email TAP Award Notification in 3-4 weeks after completing your application.

APTS (Aid to Part-Time Study)

If you plan to attend Lehman as a part-time student, you may be eligible for a New York State Aid to Part-Time Study (APTS) award. After completing your New York State TAP application, you will need to complete a CUNY supplement form to be considered for this award. Log on to the CUNY Portal to access the Admissions/Financial Aid Center and complete your "eSupp" (CUNY Supplement) application.



How Can I Get a CUNY Scholar Support Card?

CUNY's Scholar Support Prepaid Card is a faster and easier way for you to get and manage your financial aid and work-study payments. Your financial aid grant, loan and work-study payments are automatically deposited to a prepaid MasterCard on the scheduled disbursement date. There is no more waiting for a check to arrive in the mail. This card is accepted at any store or ATM where MasterCard debit cards are accepted. Learn more about this option and enroll to receive your card at:

<http://www.cuny.edu/admissions/financial-aid/info-resources/scholars-support.html>

HE GETS IT. Fast. Smart. Secure. Put your financial aid on easy-to-manage CUNY Scholar Support Card. Use it just about anywhere for anything.

DO YOU? Click to **ENROLL TODAY**
www.enroll.citiprepaid.cuny.com

MasterCard is a registered trademark of MasterCard International Incorporated.

For More Information

Learn more about the opportunities available to finance your college education by visiting Lehman's Office of Financial Aid Website at <http://www.lehman.edu/financial-aid>



Office of Financial Aid	Room Sh-136	718-960-8545
Financial Aid Web Lab	Room Sh-131A	718-960-8620
Admissions' Office	Room Sh-161	718-960-8706
Bursar's Office	Room Sh-031	718-960-8573
Registrar's Office	Room Sh-114	718-960-8613
Scholarship Office	Room Sh-205	718-960-8506