



2020–2021 Aggregate Verification Worksheet

V5-Dependent 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 Financial Aid Office may require additional documentation and your FAFSA information may need to be corrected. 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 parent(s) are tax filers, obtain a **2018 IRS Tax Return Transcript** for yourself and your parent(s). Request an IRS Tax Return Transcript online at 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 your parents had income earned from work in 2018, but did not and were not required to file a tax return, they must provide a **2018 Verification of Non-Filing Letter** dated on or after October 1, 2019. They may request a Verification of Non-Filing Letter at www.irs.gov/Individuals/Get-Transcript or by phone at 1-800-908-9946. Both you and your parents must provide copies of **W-2 forms** issued by your employers for all income earned from work in tax year 2018 that was not reported on a tax return.
3. Complete Sections A-D of this worksheet – you and one of your parents must sign the Section E certification on page 3 of the worksheet. Collect the documents required for Section F on page 3 but do **NOT** complete that section 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 F 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 Home Phone Number (include area code)		Student’s Email Address	

B. Parents’ Household Information

List the people your parent(s) will support between July 1, 2020 and June 30, 2021. Include:

- Yourself and your parent(s)
- Your parents’ other children if (a) your parent(s) provide more than half of their support, or (b) if the other children would be required to provide parental information were they to complete a FAFSA for 2020–2021. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s), and your parent(s) 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, excluding your parent(s), who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible 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		

Student Name:	Student SSN: XXX-XX- _____
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C. Student's Income Information to Be Verified

NOTE: If you 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 box that applies:

- I used the IRS Data Retrieval Tool in FAFSA-on-the-Web to transfer 2018 IRS income tax information into my FAFSA. *[The income tax information from your FAFSA will be used to complete the verification process.]*
- I did not (or could not) transfer my 2018 income information to the FAFSA using the IRS Data Retrieval Tool. I have attached a copy to this worksheet of my **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.
- I have not filed (and am not required to file) a 2018 federal income tax return and I had no income earned from work in 2018.
- I have not filed (and am not required to file) a 2018 federal income tax return, but I had income earned from work in 2018 as listed below. *[List every employer and the amounts earned in 2018, even if they did not issue an IRS Form W-2. Attach copies of all 2018 IRS Forms W-2 that were issued to you by 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 W2 Attached?
<i>Example: ABC Company</i>	\$1367.75	Yes

D. Parent(s)' Income Information to Be Verified

NOTE: Provide the requested income information for each parent/stepparent listed in Section B of this worksheet. Notify your Financial Aid Office if your parents had a change in marital status after December 31, 2018. If your parent(s) filed (or will file) an amended 2018 IRS tax return, they may be required to submit additional documentation to the Financial Aid Office.

Check the appropriate box (or boxes):

- I/we 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/we 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 your parents filed a joint tax return, but you reported your parent's 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 your parent(s) were non-tax filer(s) 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 W2 Attached?
<i>Example: ABC Company</i>	\$1367.75	Yes

Student Name:	Student SSN: XXX-XX- _____
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E. Certification and Signatures – Student and one parent must sign

We certify that all the information reported on this worksheet is complete and correct. We further understand that if we purposely give false or misleading information, we could be fined, jailed, or both.

Student Signature	Date
Parent Signature	Date

Do not complete Section F below in advance. You must complete and sign Section F IN PERSON at the Financial Aid Office at your college.

F. Identity Verification and Statement of Educational Purpose

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