



**Herkimer**  
THE STATE UNIVERSITY OF NEW YORK

## **2014-2015 Verification Worksheet Information and Instructions**

### **What is Verification?**

Your 2014–2015 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you (and your parents if applicable) reported on your FAFSA. Documents may be requested to resolve conflicting data. To verify that we have the correct information we will compare your FAFSA with the information on this worksheet and with other required documents. If there are discrepancies, your FAFSA information may need to be corrected. You (and at least one parent if applicable) must complete and sign this worksheet, attach all required documents, and submit the form and required documents to the Financial Aid Office. If you have questions about verification, contact the Financial Aid Office as soon as possible so that your financial aid awards will not be delayed.

### **What happens after verification is completed?**

All submitted documents will be reviewed for accuracy. If necessary, corrections will be made to the FAFSA and students will be notified by the Central Processing System that changes have been made. Once the changes are complete, the student will receive an award letter. Awards can be viewed and accepted through Student Online Services from the college website.

### **Deadline for submitting documents**

All requested information must be received within 30 days from the last request for information. Failure to submit information in a timely manner may result in your application being filed as inactive with no further consideration and no federal aid will be processed.

**The Verification Worksheet must be signed, dated and returned to the Financial Aid Office. This may be mailed, faxed, or emailed to:**

Herkimer County Community College  
100 Reservoir Road  
Herkimer, NY 13350  
315-866-0300 ext. 8282  
Fax: 315-866-2908  
finaid@herkimer.edu

# Income Information

This document is an IRS Tax Return Transcript for the year 2013. It includes personal information such as name, address, and Social Security Number. It also lists various income sources and tax payments. The transcript is a detailed record of the taxpayer's 2013 tax return.

**YES!**

This is the front page of the IRS Form 1040, U.S. Individual Income Tax Return for the year 2013. It contains fields for personal information, filing status, and exemptions. The form is used to report income and calculate tax liability.

**NO!**

Part of the verification process involves verifying that the information on the FAFSA form is correct. There are two ways the Financial Aid Office can determine that the FAFSA information reflects the family's income. Students (and parents, if applicable) can use the IRS Data Retrieval process or supply the Financial Aid Office with an IRS Tax Transcript.

**COPIES OF PERSONAL TAX RETURNS ARE NOT SUFFICIENT FOR INCOME VERIFICATION PURPOSES!**

1. **IRS Data Retrieval** - Complete this section if the student and/or parent (if applicable) filed or will file a 2013 income tax return with the IRS. The **BEST** way to verify income is using the IRS Data Retrieval Tool as part of FAFSA on the Web. If the student and/or parent have not already used the tool, go to [www.FAFSA.gov](http://www.FAFSA.gov), login to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the FINANCIAL INFORMATION section of the form. From there, follow the instructions to determine if the student and/or parent is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. If you need more information about when, or how to use the IRS Data Retrieval Tool, contact the Financial Aid Office. For a demonstration on how to use this tool, go to: [http://www.youtube.com/watch?v=W47\\_YTRVYD4](http://www.youtube.com/watch?v=W47_YTRVYD4)
2. **IRS Tax Transcript** – There are three ways you can request an IRS Tax Transcript. Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript". You will need your social security number, date of birth, and the exact address used when you filed your tax return.
  - a. **ONLINE:** Go to [www.irs.gov](http://www.irs.gov) and select "Get Transcript of Your Tax Records". You can select Online or Mail to receive your transcript. By selecting Online, you can view and print your transcript immediately. You will have to set up an account with the IRS to do this. By selecting Mail, a paper transcript will be mailed to the requestor within 5-10 days. **THIS CANNOT BE SENT DIRECTLY TO Herkimer College.** Please **sign** the tax transcript and send it to the Financial Aid Office.
  - b. **TELEPHONE:** 1-800-829-1040 A paper transcript will be mailed to the requestor within 5-10 days. **THIS CANNOT BE SENT DIRECTLY TO HCCC.** Please send the tax transcript to the Financial Aid Office.
  - c. **IRS FORM 4506T-EZ:** <http://www.irs.gov/pub/irs-pdf/f4506t.pdf?portlet=103> A paper transcript will be mailed to the requestor within 5-10 days. Please send the tax transcript to the Financial Aid Office.