

**UTC Financial Aid Office**  
**2011-2012 VERIFICATION WORKSHEET**  
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Your Free Application for Federal Student Aid (FAFSA) was selected for review by the U.S. Department of Education in a process called "Verification". This means UTC must compare the information from your FAFSA with your 2010 Federal tax forms and this worksheet. If there are differences between your application information and your financial documents, corrections will be reprocessed electronically based on the documentation submitted. **Any correction may cause changes to your award amount(s).**

***You may need to submit the following:***

- 1) to see what you need to submit, refer to student's **MyMocsnet** account under Financial Aid Requirements.
- 2) this worksheet **(REQUIRED)**
- 3) 2010 signed copies of student/spouse and/or parent/step-parent Federal tax returns (1040, 1040A, or 1040EZ) **IF** you did not use the IRS data import option on your FAFSA.

If you do not have a copy of your 2010 tax returns you may contact the **IRS at 1-800-829-1040** and request a **tax return transcript**.

**All documents must be signed.**

**The Financial Aid office reserves the right to request additional documents, if needed, to confirm the data submitted on your FAFSA. UTC is required to request and review this information under federal regulations 34 CFR, Part 668.**

All information should be sent to: **UTC Financial Aid Department 4805, 615 McCallie Avenue, Chattanooga, TN 37403-2598** or by **FAX 423 425-2292**. You should complete verification as soon as possible so that your financial aid will not be delayed. If you need help, you may visit our office, contact us at 423 425-4677, or via email at [finaid@utc.edu](mailto:finaid@utc.edu).

**Incomplete and/or improperly signed forms will delay completion of file and awarding.**

### A. DEPENDENCY STATUS

The following questions are used to determine your dependency status.

If you check **one or more** of the following boxes you are an **Independent** student and will not have to provide parent information.

If you **cannot** check at least one of the following boxes you will need to provide parent information on sections **B, D, E, & F**.

<input type="checkbox"/> I was born before January 1, 1988	<input type="checkbox"/> I was married when I <b>signed</b> the FAFSA	<input type="checkbox"/> I will be working on a master's or doctorate program (e.g., MA, MBA, MD, JD, PhD, EdD, graduate certificate)	
<input type="checkbox"/> I am serving on active duty in the U.S. Armed Forces	<input type="checkbox"/> I am a veteran of the U.S. Armed forces	<input type="checkbox"/> I have children and I provide more than half of their support now and will continue to provide more than half their support through June 30, 2012	
<input type="checkbox"/> Since I turned age 13, both of my parents were deceased	<input type="checkbox"/> I have been in foster care at some time since turning age 13	<input type="checkbox"/> I have dependents (other than children or my spouse) who live with me and I provide <b>more</b> than half of their support now and will continue to provide more than half support through June 30, 2012	
<input type="checkbox"/> I was a dependent or ward of the court at some time since turning age 13	<input type="checkbox"/> I am currently or I was an emancipated minor as determined by a court in my state of legal residence	<input type="checkbox"/> I am currently or I was in legal guardianship immediately before reaching the age of being an adult as determined by a court in my state of legal residence	<input type="checkbox"/> I am homeless or I am at risk of being homeless as determined by the director of a runaway or homeless youth basic center or transitional living program

## B. HOUSEHOLD INFORMATION

On your Free Application for Federal Student Aid, you identified the number of family members in your household and the number in college. We now need to learn more about those members of your household. ***Please list each member, providing all requested information as applicable.*** [Attach an additional sheet if necessary.] ***Do not forget that if you are a DEPENDENT student, you should report your PARENTS' household information.***

FULL NAME	AGE	RELATIONSHIP TO STUDENT	NAME OF COLLEGE ATTENDING (at least 6 hours) in 2011-12
<i>Missy Jones (example)</i>	<b>18</b>	<i>Sister</i>	<i>Central University</i>
STUDENT		SELF	UTC

**C. STUDENT/SPOUSE TAX FORM INFORMATION**

1. Check One for Student: \_\_\_\_\_ Required to file a 2010 U.S. Income Tax Return.  
**Please refer to student's MyMocsnet account to see if tax return is required.**
- \_\_\_\_\_ Has not, will not, and is not required to file a 2010 U.S. Income Tax Return.
2. Check One for Spouse: \_\_\_\_\_ **No Spouse/Not Married**
- \_\_\_\_\_ Required to file a 2010 U.S. Income Tax Return.  
**Please refer to student's MyMocsnet account to see if tax return is required.**
- \_\_\_\_\_ Has not, will not, and is not required to file a 2010 U.S. Income Tax Return.

**D. PARENT TAX FORM INFORMATION (IF STUDENT IS DEPENDENT)**

1. Check one for Parent: \_\_\_\_\_ Required to file a 2010 U.S. Income Tax Return.  
**Please refer to student's MyMocsnet account to see if tax return is required.**
- \_\_\_\_\_ Has not, will not, and is not required to file a 2010 U.S. Income Tax Return.
2. Check one for Step-Parent: \_\_\_\_\_ **No Step-Parent/Not married**
- \_\_\_\_\_ Required to file a 2010 U.S. Income Tax Return.  
**Please refer to student's MyMocsnet account to see if tax return is required.**
- \_\_\_\_\_ Has not, will not, and is not required to file a 2010 U.S. Income Tax Return.

**E. UNTAXED INCOME RECEIVED in 2010**

Student/spouse/parents: Please list any **untaxed** income received in **2010**. Report the **total** amount received for **January – December 2010**

**Be sure to enter "ZEROS" in each blank if NO funds were received.**

Student/Spouse	Calendar Year 2010	Parent(s)
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Forms in Boxes 12a through 12d, codes D, E, F, G, H, and S.	\$
\$	Child support <b>you/ spouse or parent/step-parent <u>received</u></b> for <b><u>all</u></b> children. <b><u>Don't include</u></b> foster care or adoption payments.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits) <b><u>Don't include</u></b> the value of basic military allowance for housing.	\$
\$	Veterans' non-education benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Any other untaxed income not reported, such as workers' compensation, disability, etc. <b><u>Don't include:</u></b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), Workforce Investment Act educational benefits, foreign income exclusion or credit for federal tax on special fuels.	\$
\$	Money or gifts you received, or was paid on your behalf (e.g., bills), not reported elsewhere on this form.	XXXXXXXXXX

**F. READ STATEMENT CAREFULLY AND SIGN**

By signing this form, I certify that all information is complete and correct.

Student Signature \_\_\_\_\_ Date \_\_\_\_\_ Parent Signature (if dependent) \_\_\_\_\_ Date \_\_\_\_\_

Student's phone# \_\_\_\_\_ Parent's daytime phone# \_\_\_\_\_

**PLEASE MAKE SURE THE STUDENT'S NAME AND UTC ID ARE ON EVERY PAGE OF DOCUMENTS SUBMITTED**