

Your 2018-2019 FAFSA was selected for verification review. The University at Buffalo Financial Aid Office will verify your financial aid eligibility by comparing the information on your FAFSA to the information provided on this worksheet and other documents provided. If necessary, your FAFSA will be corrected. Your eligibility for federal financial aid cannot be determined until the verification review has been completed.

This worksheet should be completed in its entirety by you (and your spouse if you are married) before the deadline date published at financialaid.buffalo.edu/process/verification.php. If necessary, additional items may be added to your **HUB To Do List** during the review. Requests for additional items and verification results will be sent to your UB email address.

Section 1: Student Information

Last Name: _____ First Name: _____ Middle I: _____ Person Number: _____

Select the statement(s) that best represent your 2016 tax filing status and source of income. Complete the instructions as directed.

1. **I filed a 2016 Federal Income Tax Return.** Check the statement that applies to you:
- I used the IRS Data Retrieval Tool when completing the FAFSA and I did not change my income information prior to the submission of the application or correction.
 - I DID NOT use the IRS Data Retrieval Tool when completing the FAFSA.
 - Attach your 2016 IRS Tax Return Transcript(s) to this worksheet. Visit irs.gov and click on "Get a Tax Transcript" to obtain your IRS Tax Transcripts online.
 - I filed an Amended Tax Return
 - Attach your 2016 IRS Tax Return Transcript(s) to this worksheet and;
 - A copy of your signed 2016 Amended Tax Return (1040X)

Please note: Only an IRS Tax Return Transcript will be accepted. Copies of a Federal Tax Return (1040 forms, Tax Account Transcript or Record of Account Transcript cannot be accepted and will be destroyed.

- I filed a foreign tax return.
 - Attach a copy of your Foreign Tax Transcript with a copy of English translation. If you are unable to obtain a free copy of your transcript, a signed copy of your Tax Return may be provided along with documentation that the foreign tax authority charges a fee to obtain the transcript.

2. **I DID NOT file a U.S. or Foreign 2016 Federal Income Tax Return and I was not required to file.** (Check the guidelines on page 4 to see if you are required to file taxes).
- Submit the IRS Verification of Non-Filing Letter. To obtain the letter, submit IRS form 4506-T to the applicable address on page 2 of the form. Select item number 7 on the form to indicate which document you are requesting. The form is available at financialaid.buffalo.edu/forms or irs.gov. The Non-Filing Letter may be available online if you have filed taxes in a prior year. Visit irs.gov and click on the "Get my Tax Record" link to use this option.
 - List the employer(s) and any income received in 2016. Attach copies of all W2 statements. Attach an additional sheet if extra space is required. Please leave the box below "blank" if you did not have any income earned from work in 2016.
 - Please leave the Student Employer box below "blank" if you did not earn income from work in 2016 and attach a statement explaining how your household was supported in 2016.

Student's Employer(s) Name	2016 Amount Earned	IRS W-2 Attached
<i>(Example) Suzy's Auto Body Shop</i>	\$2,000.00	<input checked="" type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes

Person Number _____

Section 2: Spouse Information

- Check this box if you were single on the date you submitted your FAFSA, or if you are married and filed a joint 2016 Federal Tax Return. Continue to Section 3 of this worksheet.

If you did not check the box above, your spouse must complete the remainder of Section 2 below.

Select the statement(s) that best represent your 2016 tax filing status and source of income. Complete the instructions as directed.

1. **I filed a 2016 Federal Income Tax Return.** Check the statement that applies to you:

- I used the IRS Data Retrieval Tool when completing the FAFSA and I did not change my income information prior to the submission of the application or correction.

- I DID NOT use the IRS Data Retrieval Tool when completing the FAFSA.

- Attach your 2016 IRS Tax Return Transcript(s) to this worksheet. Visit irs.gov and click on "Get a Tax Transcript" to obtain your IRS Tax Transcripts online.

Please note: Only an IRS Tax Return Transcript will be accepted. Copies of a Federal Tax Return (1040 forms), Tax Account Transcript or Record of Account Transcript cannot be accepted and will be destroyed.

- I filed a foreign tax return.

- Attach a copy of your Foreign Tax Transcript with a copy of English translation. If you are unable to obtain a free copy of your transcript, a signed copy of your Tax Return may be provided along with documentation that the foreign tax authority charges a fee to obtain the transcript.

2. **I DID NOT file a U.S. or Foreign 2016 Federal Income Tax Return and I was not required to file. (Check the guidelines on page 4 to see if you are required to file taxes).**

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- List the employer(s) and any income received in 2016. Attach an additional sheet if extra space is required. Attach copies of all W2 statements
- Please leave the Spouse Employer box below "blank" if you did not earn income from work in 2016 and attach a statement explaining how your household was supported in 2016.

Spouse's Employer(s) Name	2016 Amount Earned	IRS W-2 Attached
<i>(Example) Suzy's Auto Body Shop</i>	\$2,000.00	<input checked="" type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes

Person Number _____

Section 3: Income Exclusions & Untaxed Income

Complete each line by either entering the dollar amount received or checking the Not Applicable box to indicate that the item listed does not apply to you.

Income Exclusion	Student (Check the box if Not Applicable)	Spouse (Check the box if Not Applicable)
Rollover amount included in IRA distribution	\$ N/A <input type="checkbox"/>	\$ N/A <input type="checkbox"/>
Untaxed Income	Student (Check the box if Not Applicable)	Spouse (Check the box if Not Applicable)
IRA, Deductions and payments to: self-employed SEP, SIMPLE, KEOGH and other qualified plan	\$ N/A <input type="checkbox"/>	\$ N/A <input type="checkbox"/>
Tax Exempt Interest	\$ N/A <input type="checkbox"/>	\$ N/A <input type="checkbox"/>
Untaxed Portions of IRA Distributions	\$ N/A <input type="checkbox"/>	\$ N/A <input type="checkbox"/>
Untaxed Portions of Pensions	\$ N/A <input type="checkbox"/>	\$ N/A <input type="checkbox"/>

Section 4: Household Verification

List ALL individuals in your household, including:

1. Yourself and your spouse (if married); and
2. Your other children if you provide more than half of their support from July 1, 2018 through June 30, 2019; and
3. Other people that live with you if you currently provide more than half of their support and will continue to provide more than half of their support from July 1, 2018 and June 30, 2019.

Write the names of all household members in the space(s) below along with the name of the college for any household member who will be enrolled at least half-time between July 1, 2018 and June 30, 2019 in a degree, diploma, or certificate program at a Title IV eligible institution. **Do not include parents' colleges** (parents cannot be counted in the number in college total). If you need more space, attach a separate sheet.

*If you have indicated more than one in college, enrollment verification may be required.

Full Name	Age	Relationship	University/College*
		Self	University at Buffalo

Section 5: Certification and Signature

I certify that all information provided in this document is true, complete and accurate to the best of my knowledge. I further understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. Also, purposely giving false or misleading information on this worksheet may lead to fines, jail sentences, or both. I authorize the University at Buffalo to make any change(s) necessary as a result of the updated information that I have provided.

Student Signature

Date

Spouse Signature (if married)

Date

Minimum Income Requirements to File a 2016 Tax Return

Federal regulations require 2016 taxes to be filed based on the following income guidelines:

Filing Status	Age	Minimum W-2 Income Requirement	Minimum Self-Employment Income Requirement
If you are single and can be claimed on another taxpayer's return	Under 65	\$6,300	\$400
Single	Under 65	\$10,350	\$400
	65 or older	\$11,900	\$400
Head of Household	Under 65	\$13,350	\$400
	65 or older	\$14,900	\$400
Married Filing Jointly	Under 65 (both spouses)	\$20,700	\$400
	65 or older (one spouse)	\$21,950	\$400
	65 or older (both spouses)	\$23,200	\$400
Married Filing Separately	Any age	\$4,050	\$400
Qualifying Widow(er) with Dependent Children	Under 65	\$16,650	\$400
	65 or older	\$17,900	\$400

Regardless of your gross income, you are generally required to file an income tax return if any of the following are true:

- You had net self-employment income of \$400 or more
- You had unemployment income
- You are an unmarried dependent under the age of 65 and had more than \$1,050 in unearned income
- You owe Alternative Minimum Tax
- You owe household employment taxes
- You owe additional taxes on a retirement plan (an individual retirement arrangement (IRA) or other tax-favored account) or health savings account
- You must repay the 2008 Homebuyer Credit (or any other recapture taxes)
- You owe Social Security and Medicare taxes on unreported tip income
- You earned \$108.28 or more from a tax-exempt church or church-controlled organization
- You received distributions from an MSA or Health Savings Account
- You received an advance payment on the Premium Tax Credit.