



UNIVERSITY
ST. THOMAS

UNIVERSITY OF ST. THOMAS 2009-2010 VERIFICATION WORKSHEETS

OSFA Revised 2-11-2008

Financial Aid Program Rules 34 CFR (Part 668)

Office of Scholarships and Financial Aid ‡ 3800 Montrose Blvd. ‡ Houston, Texas 77006

Main (713) 525-2170 ‡ Fax (713) 525-2142

UST ID#

COMPLETE THIS VERIFICATION FORM AND SUBMIT IT TO THE OFFICE OF SCHOLARSHIPS AND FINANCIAL AID AS SOON AS POSSIBLE TO AVOID FURTHER DELAYS TO YOUR FINANCIAL AID AWARD.

Your application was selected for review in a process called "verification" by either the Department of Education or UST's Office of Scholarships and Financial Aid. The data you submitted on your FAFSA will be compared to the information from this worksheet, signed copies of your (your spouse) and your parent(s) or parent/stepparent's 2008 federal tax forms (all schedules included), and other financial documents. UST's OSFA reserves the right to resolved data discrepancies before awarding federal, state, and university financial aid funds. This may require your UST financial aid counselor to make electronic corrections with the Department of Education. Completing this process may exceed two weeks.

A. STUDENT INFORMATION

Last Name	First Name	Middle Initial	Social Security Number	
Address	Apt. #	City	State	Zip Code
Date of Birth	UST Email Address		Phone Number (include area code)	

B. EDUCATIONAL RESOURCE DISCLOSURE

Please contact your OSFA Counselor if you are receiving or applying for the following educational resources. Additional paperwork may be required. Contact your OSFA counselor for more information (713) 525-2170.

Outside scholarship	<input type="checkbox"/> Yes <input type="checkbox"/> No	Texas Tomorrow Fund	<input type="checkbox"/> Yes <input type="checkbox"/> No
Departmental scholarship	<input type="checkbox"/> Yes <input type="checkbox"/> No	AmeriCorps/Teach for America benefit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Federal scholarship	<input type="checkbox"/> Yes <input type="checkbox"/> No	Religious Order Tuition	<input type="checkbox"/> Yes <input type="checkbox"/> No
State scholarship	<input type="checkbox"/> Yes <input type="checkbox"/> No	Alumni Tuition Discount	<input type="checkbox"/> Yes <input type="checkbox"/> No
Continuing Students Scholarship	<input type="checkbox"/> Yes <input type="checkbox"/> No	UST Employee Tuition Benefit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Veterans Benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No	UST Dependent Tuition Benefit	<input type="checkbox"/> Yes <input type="checkbox"/> No

C. STUDENT INFORMATION

- Were you born before January 1, 1986? Yes No
- At the time you completed the 2009-10 FAFSA, were you Married? Yes No
- Are you a Graduate or Doctorate Student? Yes No
Please Note: Students in the UST Joint five (5) year program are defined as Undergraduate students.
- Are you a veteran of the US Armed Forces? Yes No
- Are you currently serving on active duty in the US armed Forces (other than training)? Yes No
- Do you have children who you provide more than 51% of their financial support between July 1, 2009 & June 30, 2010? Yes No
- Do you have dependents (other than your children or spouse) currently live with you & receive more than 51% of their financial support from you, now through June 30, 2010? Yes No
- At anytime since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court? Yes No
- Are you an emancipated minor as determined by a court in your state of legal residence? Yes No
- Are you or were you in legal guardianship as determined by a court in your state of legal residence? Yes No
- At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless? Yes No
- At any time on or after July 1, 2008, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless? Yes No
- At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? Yes No

According to the Paper Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed and complete and review the information collected

If you answered NO to every question, you are classified as a Dependent Student and must provide your and your Parent(s) or Parent/Stepparent's information to complete this verification process.

D. FAMILY INFORMATION (List the people in your household)

Independent Students:
 (a) Yourself, and your spouse;
 (b) Your children, if you will provide more than 51% of their financial support from July 1, 2009 to June 30, 2010;
 (c) Other individuals continuously residing with you (and spouse) that receive more than 51% of their financial support from July 1, 2009 through June 30, 2010 from you (and spouse).

Dependent Students: This information is required even if you don't live with your parent(s) or parent/stepparent.
 (a) Yourself;
 (b) Your Parent(s) or Parent and Stepparent; that provided more than 51% of your financial support.
 (c) Your parents' other children, even if they don't live with your parent(s) or parent/stepparent, for whom your parents provide more than 51% of their financial support from July 1, 2009 to June 30, 2010; and would be required to provide parental information when applying for federal student aid;
 (d) Other individuals continuously residing with your parent(s) or parent/stepparent that receives more than 51% of their financial support from July 1, 2009 through June 30, 2010 from your parent(s) or parent/stepparent.

Required Demographic Data: (for each household member entered all requested data stated below)

- (1) Legal Name
- (2) Social Security Number
- (3) Date of Birth
- (4) Age
- (5) Relationship to student applicant
- (6) Name of college attending if enrolled at least 1/2 in a degree, diploma or certificate program, between July 1, 2009 through June 30, 2010.

Relationship	Full Name	SSN	Date of Birth	Age	College Attending
Self					University of St. Thomas

E. STUDENT (AND SPOUSE) TAX FORM AND INCOME INFORMATION (all applicants)

Check only one box below. If you did not keep a copy of your tax return, request a copy from your tax preparer or a copy of a Tax transcript from the Internal Revenue Service. (IRS 1-800-829-1040). UST does not require you to submit W2 forms

- I am submitting my signed 2008 tax return with all schedules.
- I DID NOT file a 2008 income tax return, because I am not required to file a 2008 income tax return.

List below your employer(s) and any income received in 2008. This information may be on the W-2 forms, on IRS Form 1040—lines 7 + 12 + 18 + Box 14 of IRS Schedule K-1 (Form 1065); on 1040A—line 7; or on 1040EZ—line 1.

	Name of Employer	2008 earned amount
Self		
Self		
Spouse		

According to the Paper Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed and complete and review the information collected

F. PARENT(S) OR PARENT/STEPARENT TAX FORMS AND INCOME INFORMATION (dependent applicants)

Check only **one box** below. If you did not keep a copy of your tax return, request a copy from your tax preparer or a copy of a Tax transcript from the Internal Revenue Service. (IRS 1-800-829-1040). **UST does not require you to submit W2 forms**

I am submitting my parent’s signed 2008 tax return with all schedules.

My parents **DID NOT** file a 2008 income tax return, because they were not required to file a 2008 income tax return.

List below your parent’s employer(s) and any income received in 2008. This information may be on the W-2 forms, on IRS Form 1040—lines 7 + 12 + 18 + Box 14 of IRS Schedule K-1 (Form 1065); on 1040A—line 7; or on 1040EZ—line 1.

Parent	Employer	Parent 2008 earned amount from employer
Mother/Stepmother		
Father/Stepfather		

G. STUDENT (AND SPOUSE) AND PARENT UNTAXED INCOME INFORMATION

Please do not leave any space blank. Answer ZERO if the value is not applicable.

Sources of Additional Financial Information for 2008	Student	Student’s Spouse	Mother/Stepmother	Father/Stepfather
Education credits: IRS Form 1040—line 50 or 1040A—line 31.				
Child support paid because of divorce or separation or as a result of a legal requirement.				
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.				
Educational grants and scholarships reported to the IRS as a part of your adjusted gross income. Include AmeriCorps, as well as grant and scholarship portions of fellowships and assistantships.				
Combat pay or special combat pay. Only enter the amount that was taxable and included IRS as apart of your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).				
Total Additional Financial Resources				
2008 Untaxed Income	Student	Student’s Spouse	Mother/Stepmother	Father/Stepfather
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.				
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.				
Child support received for all children. Don’t include foster care or adoption payments.				
Tax exempt interest income: IRS Form 1040—line 8b or 1040A—line 8b.				
Untaxed portions of IRA distributions from IRS: Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.				
Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.				
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).				
Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation and/or VA Educational Work-Study allowances.				
Other untaxed income not reported, such as workers’ compensation, disability, etc. Don’t include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements, foreign income exclusion or credit for federal tax on special fuels.				
Total 2008 Untaxed Income				

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H. ELIGIBILITY CHECKLIST

1. Student must be formally admitted into a degree seeking program or School of Education teacher certification program through the University of St. Thomas.
2. Student must be enrolled for a **minimum of 6 credit hours** to be eligible for Federal and Texas loan programs. Criteria for Federal, Texas, and UST grant and scholarship programs vary.
3. Student cannot receive financial aid from UST and another institution in the same period.
4. Student must be a US Citizen, naturalized citizen, or an eligible non-citizen.
5. Student must not be in default on a federal or state loan or owe a repayment to a federal or state grant or scholarship program.
6. Undergraduate students are required to have a minimum of 2.0 or higher CumGPA at UST. Graduate students are required to have a minimum of 3.0 or higher Cum GPA at UST.
7. Student must complete 75% of all UST courses attempted at UST.

I. VERIFICATION CHECKLIST

- All students:** Attach your (and your spouse's) **signed 2008 federal income tax forms**, including **all schedules**.
- Dependent Students:** Attach your parent(s) or parent/stepparent's **signed 2008 federal income tax forms**, including **all schedules**.
- Do not** leave any section of the verification form blank. An uncompleted verification worksheet will be return to the student applicant and delay the financial aid award process.

*Please contact your UST financial aid counselor if you have any questions.
Your counselor will contact you if additional information or documentation is required
Please continuously check your STTHOM email account for correspondence.*

J. STUDENT AND PARENT CERTIFICATION OF STATED INFORMATION:

PLEASE ANSWER: Are you currently incarcerated in a correctional facility? Yes No

If yes, please report the name and address of the facility:

By signing this worksheet;

I (we) certify that all the information reported on it is complete and correct.

I (we) certify that all the information has been read.

I (we) certify that all financial aid eligibility requirements are being met.

I (we) certify that federal & state financial aid will only be used to pay the cost associated with attending the University of St. Thomas.

I (we) understand that the Secretary of Education has the authority to verify information reported in this verification form and the FAFSA with the IRS and other federal agencies.

If you purposely give false or misleading information you may be fined up to \$20,000, sentenced to prison, or both.

Student Signature:

Date:

Parent Signature:

Date:

(REQUIRED FOR DEPENDENT STUDENTS)

OSFA USE ONLY:

Counselor:

Date Verified:

EFC:

Verification Code:

Recalculated EFC:

Trans #:

COD Return Date:

Counselor's Notes:

Trans # Returned:

PJ: Yes No