

2009-2010**Quality Assurance Worksheet Instruction Sheet - Independent Students**

You are required under federal regulation to complete this Quality Assurance Worksheet. The Office of University Scholarships and Financial Aid will not be able to award and/or disburse your financial aid until you have completed this process. The information you provide will be used to update or correct the information provided on the FAFSA form if necessary.

Follow all instructions. Complete all sections. Provide the requested signatures and documents.

TABLE A

Row 1: Please list **yourself** in Table A and mark your status as **“Independent”**.

TABLE A

Row 2: Please provide information about your spouse if you are married.

TABLE A

Row 3 through 8: The remaining rows in Table A are for each of your children/stepchildren for whom you will provide **more than half of their support** between July 1, 2009 and June 30, 2010. Please note that your children/stepchildren do **not have to live** in your house to be included.

- For anyone listed in Table A (rows 3 through 8), please use the following link to go to the FAFSA website, <http://www.fafsa.ed.gov/>. You will see a box labeled “Before Beginning a FAFSA,” and inside there is a link to “Determine Your Dependency Status.” Click the link and use the dependency status worksheet to determine the dependency status of anyone you listed in rows 3 through 8 on Table A. List your responses for each person in the 4th column of the table.
- For any person classified as independent, indicate “Yes” or “No” in the column that asks, “if independent, does this person receive more than **50% of support** from you.”
- Finally, if anyone you listed will be attending a college or university at least half time and will be working towards a degree or certificate program, list the college or university he/she will be attending.

TABLE B

Row 9 through 12: Please list anyone else that **lives in your house and** receives **more than half of their support** from you, and will **continue** to receive **more than half of their support** from you between July 1, 2009 and June 30, 2010. Finally, if anyone you listed will be attending a college or university at least half time and will be working towards a degree or certificate program, list the college or university he/she will be attending.

**2009-2010
Quality Assurance Worksheet— Independent Students**

Student's ID #: _____ Email: _____

Student's Full Legal Name: _____ , _____
(Please print clearly) last first middle

Household information
Please read the instructions on the first page before completing this form

TABLE A

Full Name	Age	Relationship to Student	Dependent or Independent	If Independent, does this person receive more than 50% of support from you	College/University
1)		Self			Virginia Tech
2)		Spouse (if married)			
3)					
4)					
5)					
6)					
7)					
8)					

TABLE B

Full Name	Age	Relationship to Student	Live in your House? (Yes or No)	Does this person receive more than 50% of their support from you? (Yes or No)	College/University
9)					
10)					
11)					
12)					

Student's Last Name

Student's ID Number

Tax Information

Signed copies of any of the documents below are considered a **valid tax return**. Tax returns must be **signed** by at least **one tax filer OR** the tax **preparer's** stamped, typed, signed, or printed name (**not** the company name) **AND** his/her SSN, EIN (Employer Identification Number) **or**, PTIN (Preparer Tax Identification Number).

If you did not keep a copy of your tax return, request a copy from your tax preparer or a Tax Transcript from the Internal Revenue Service by calling 1-800-829-1040.

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|---|--|
| <ul style="list-style-type: none"> ▪ 2008 IRS Form 1040, 1040A, 1040EZ ▪ 2008 E-file provider or tax filing software tax listing ▪ 2008 Federal 1040NR | <ul style="list-style-type: none"> ▪ 2008 Tax Transcript from the IRS ▪ 2008 Tax return from Puerto Rico or a foreign income tax return. |
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Please Note: If you are married and you filed a joint return, place a checkmark here _____, attach a signed copy of the return along with all W-2s, and skip questions 1 and 2.

If your federal tax filing status is anything other than married filing a joint return or if you and/or your spouse (if you are married), **did not file a federal tax return please complete questions 1 and 2.**

1) Did **you** file a 2008 Federal Income Tax Return? No Yes

If **yes**, please attach a **signed** copy of your return along with **all W-2s**, and skip question 1a.

1a) If **you** were not required to file a 2008 Federal Income Tax Return, did you work in 2008? No Yes

Name of Employer(s)	\$
	Total Yearly Earnings

2) If married, did your **spouse** file a 2008 Federal Income Tax Return? No Yes

If **yes**, please attach a **signed** copy of your spouse's return along with **all W-2s**, and skip question 2a.

2a) If your **spouse** (if you are married) was not required to file a 2008 Federal Income Tax Return, did he/she work in 2008? No Yes

Name of Employer(s)	\$
	Total Yearly Earnings

Student's Last Name _____

Student's ID Number _____

Untaxed Income Information		
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Please provide the total amount for 2008 for any items which pertain to you or your spouse. Do not leave any lines blank. Please use \$0 or N/A if you have no amount to list for an item.

	Spouse	Student
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 Form in boxes 12a through 12d, codes D,E,F,G,H, and S.	\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 (lines 28+32) or 1040A (line 17).	\$	\$
Child support received for all children. Do not include foster care or adoption payments.	\$	\$
Tax exempt interest income from 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 and annuities 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) <i>commonly reported in box 14 of the W-2 form.</i>	\$	\$
Veteran's non-educational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income not reported elsewhere , such as worker's compensation, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$	\$
Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.	\$	\$

After you have completed the entire form, please read below and sign.
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Please review all the information on this form and your supporting documentation for completeness. Be sure all necessary signatures have been provided. Make sure all copies are legible and that your name and ID number are clearly indicated on the top of each page submitted.

If you purposely give false or misleading information on this worksheet, you may receive a fine, a prison sentence, or both. By signing this information request, I certify that all information is complete and correct.

**Student's
Signature** _____

Date _____