STUDENT - VERIFICATION INSTRUCTIONS FOR TAX EXTENSION FILERS

Your application was selected for a review in a process called “Verification.” For more information on verification, see our Web page at: www.csuchico.edu/fa/policies/verification.shtml

Preliminary Verification and Disbursement
You indicated that you requested a 2014 tax filing extension from the IRS. If you and/or your spouse still have not filed your 2014 income taxes, you may complete and submit the attached worksheet with the appropriate documentation to complete your preliminary verification so you may receive a preliminary disbursement. A preliminary verification and disbursement is considered temporary and will allow us to disburse financial aid based on your and/or your spouse’s estimated tax information.

To receive a preliminary disbursement of financial aid, you must complete the attached form and submit all required documentation from SECTION A and SECTION B.

If you and/or your spouse were initially granted a tax filing extension, but will be filing your tax returns prior to May 18, we recommend that you hold off on submitting the requested verification documents, as shown on your “To-Do-List,” until your and/or your spouse’s final tax filing information is available.

Required Final Verification
Your verification requirement is not considered complete, even if you have submitted preliminary verification documents and received a preliminary disbursement. Your verification is considered complete when our office has received your and/or your spouse’s final 2014 tax data that has been filed with the IRS.

After you and/or your spouse submit their 2014 tax returns to the IRS, you must complete the final verification process by updating your FAFSA with your tax information, and use the IRS Data Retrieval Tool, by November 2, 2015. If you are unable to use the IRS Data Retrieval Tool, a 2014 tax return transcript must be submitted to our office by November 2, 2015.

If it is determined that you and/or your spouse projected tax information was estimated incorrectly, the Financial Aid Office will adjust your award accordingly. If you received aid based on estimated tax information that you were not eligible for, you must repay it.

FAILURE TO COMPLETE FINAL VERIFICATION
If the required final verification is not completed by November 2, 2015, you will be required to repay all financial aid that has been preliminarily disbursed and all your future aid for the award year will be canceled.

If you have any questions about this information, please contact the Financial Aid Office at 530-898-6451 or via email at finaid@csuchico.edu
# Student - Preliminary Verification of Income
## For Tax Extension Filers

**RETURN TO:** Student Services Ctr. 250  
Financial Aid and Scholarship Office  
Chico, CA 95929-0705  
Phone: 530-898-6451  
Fax: 530-898-6883  
Web site: www.csuchico.edu/fa

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You and/or your spouse were granted a 2014 tax filing extension by the IRS. **In order to verify 2014 income information, you and/or your spouse must complete this form, and attach the required documentation from SECTION A and SECTION B. You are required to complete the final verification process by November 2, 2015 by using the IRS Data Retrieval Tool or by submitting a tax return transcript(s). Failure to do so will result in repayment of preliminarily disbursed aid and cancellation of future aid for 2015-16.**

**Note:** Consistent with the Supreme Court decision on the Defense of Marriage Act (DOMA), same-sex married couples must report both their information if they were LEGALLY married in a state or other jurisdiction (foreign country) that permits same-sex marriage.

The following information in Section A and Section B is required to receive a preliminary financial aid disbursement for Fall 2015.

**SECTION A — Complete the information below:**

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<th>INCOME AND RESOURCES</th>
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| **1. Wages (salaries, tips)**  
Attach a copy of your 2014 W-2 Form(s) (if applicable) | $ | $ |
| **2. Interest Income**  
Attach copies of 1099 Form(s) (if applicable) | $ | $ |
| **3. Dividend Income** | $ | $ |
| **4. Other taxable Income**  
Alimony, pensions, other real estate and investments, unemployment, capital gains/losses, royalties, trusts.  
Specify: | $ | $ |
| **5. Nontaxable Income**  
Child support, veteran’s benefits, IRA/KEOGH plans.  
Specify: | $ | $ |
| **6. Business Income**  
Including partnerships, S Corporations, and farm income.  
Attach a signed statement with the amount of business earnings or a 1099-MISC form (if applicable). | $ | $ |
| **TOTAL INCOME** | $ | $ |
| **7. 2014 Estimated Taxes from line 55 on 1040**  
Do not include self employment tax. | $ | $ |

**Comments:**

Complete Section B on the following page.
Student - Preliminary Verification of Income
For Tax Extension Filers

SECTION B
☐ Attach a copy of you and/or your spouse’s 2014 IRS filing extension approval.

If the extension was granted until October 15, 2015, attach a copy of your and/or your spouse’s IRS Form 4868. If the extension was granted beyond October 15, attach a copy of the IRS letter of approval granting an extension longer than 6 months.

Certification Statement

- I agree to update the FAFSA using the IRS Data Retrieval Tool or submit a copy of my IRS Tax Transcript to the Financial Aid Office as soon as it is filed with the IRS, but no later than the first business day of November.

- I understand that I will receive financial aid (based on estimated need) for ONE SEMESTER ONLY and that student aid may be repaid and/or revised if the actual tax information differs from that reported on the FAFSA, or I fail to provide actual tax information by the first business day of November.

I hereby certify that I have read and understand the above certification statement and that all information on this form is accurate and complete to the best of my knowledge. Each person whose information appears above MUST sign below (i.e., if spouse’s information is listed above, then spouse MUST sign below).

Student Signature________________________________________________________ Date__________________

Spouse Signature (if applicable)______________________________________________ Date__________________

Fax to 530-898-6883. Faxed documents will show up as “received” within 72 hours on the Student Center “To Do List”. Documents submitted in-person or by mail will show as “received” within five weeks.