

## IMPORTANT NEWS

### *FILING YOUR 2016-17 FINANCIAL AID APPLICATIONS*

The federal government has introduced a change in the way you and your family reports information on your FAFSA. The U.S. Department of Education has partnered with the Internal Revenue Service to allow you and your parents to transfer your 2015 income information directly from IRS records to your online application. Using this option when you complete your FAFSA should allow you to file an application with fewer mistakes.

The following information covers several topics you should review before you apply for financial aid for the Summer 2016, Fall 2016 & Spring 2017 semesters.

- **Filing Your FAFSA On the Web (FOTW)**
- **Using the IRS Data Retrieval Tool**
- **What Is Verification & How Does It Affect You?**
- **How To Request a Free IRS Tax Return Transcript**
- **Applying for New York State Aid**
- **CUNYfirst and Your Financial Aid**
- **How Can I Get a CUNY Scholar Support Card?**



### **Filing Your FAFSA-on-the-Web (FOTW)**

#### **File 2015 Income Tax Returns**

- You & your spouse (if married) or parents (if dependent) should file 2015 tax returns electronically
- If possible wait 2-3 weeks, then proceed with the FAFSA filing process outlined below
- If you are **not** required to file income taxes, you may skip this step

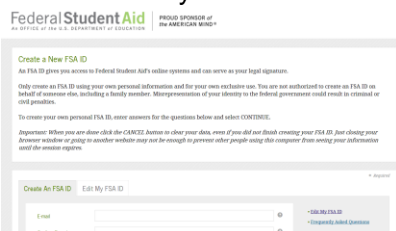
#### **Collect these items and documents**

- Your social security number
- Social security numbers and dates of birth for your parents (if dependent)
- Copies of 2015 tax returns (with W-2s) for you and your spouse (if married) or parents (if dependent) to use for reference when using IRS Data Retrieval option (outlined below)
- Bank, stock, real estate & business records (if applicable) for you and your parents
- Your alien registration number (if you are not a U.S. citizen)

#### **Use Your FSA ID**

You will need an FSA ID to access your FAFSA data on-line and update it for the new academic year. The FSA ID replaces the ED PIN as the way to access U.S. Department of Education websites and electronically sign your FAFSA.

Create or edit your FSA ID [here](#).



File your FAFSA on the Web (FOTW) at: <http://www.fafsa.gov>

- The FAFSA is used to apply for Federal Pell Grant, SEOG, Work-Study and Student Loans
- Select "Start Here" from the FAFSA homepage & choose "**2016-2017 FAFSA**" from the application choices
- When prompted, sign the application with your PIN
- **If eligible, use the IRS Data Retrieval option** to import 2015 IRS Income Tax data to the FAFSA (see next page for more information)
- FOTW gives assistance with every question with its "Help & Hints" section on the right hand side of the website

The screenshot shows a portion of the FAFSA application form. On the left, there are input fields for 'First name', 'Last name', 'Date of birth', and 'Social Security Number'. A blue arrow points from the 'Help and Hints' window to the 'First name' field. The 'Help and Hints' window on the right contains the following text: 'The student's first name. You must enter the student's first name. Use the student's proper name, not a nickname. The student's first name must match the first name on the Federal Social Security Card. The student's entry must contain only letters (A-Z), numbers (0-9), periods (.), hyphens (-), or blank spaces. No other characters are allowed. More...'.

- Under the School Selection Option, enter Lehman's Federal School Code: **007022**

The screenshot shows the 'School Selection' page of the FAFSA application. It features a navigation bar at the top with tabs for 'Student', 'School Selection', 'Dependency', 'Parent', 'Financial', 'Sign & Submit', and 'Confirmation'. The main content area has a blue header 'School Selection' and a message: 'Based on the information you provided, we have determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.' Below this, there is a section for adding schools, with a dropdown menu for 'State' and a 'SEARCH' button. The 'Federal School Code' field is highlighted, and the code '007022' is entered.

- When finished, print your FAFSA data and the Confirmation page as proof that you submitted your FAFSA successfully
- You can download your application results (called a Student Aid Report or SAR) in 3-5 days from <http://www.fafsa.gov>.

## Using the IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows you and your parents to transfer tax information from IRS tax records directly to your FAFSA. If you & your parents have indicated on your FAFSA that you have already filed your 2014 taxes, you will be given the option to use this tool when completing the financial information portion of the application. If you choose not to use this option, or use the option but manually update one of the fields, you may be selected for verification and have to submit additional information to the Financial Aid Office after your application is processed.

### **Please Note:**

- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after your return is filed.
- Data from paper tax returns will be available in 6-8 weeks.
- There are 2 separate Financial Information sections on the FAFSA. You will use this tool for the Student Financial Information section and your parents will use the tool for the Parent Financial Information section.

To use this option you must:

- Have a federal tax return filed with the IRS
- Have a valid social security number
- Have a Federal Aid Personal Identification Number (PIN)

FOTW determines if you are eligible to use the IRS Data Retrieval Tool based on your reported tax filing status.



Some tax filers may not be able to use the IRS Data Retrieval Tool and will have to enter their data from their own tax records. **You or your parents will not be offered this option if:**

- Your marital status changed after December 31, 2015
- You or they filed "married filing separately"
- You or they indicated "married" on the FAFSA but filed "head of household" on the tax return
- You or they filed an amended return
- You or they filed a foreign tax return

If eligible to use the tool, you will be transferred to the IRS Website. FOTW will notify you that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information.



On the IRS Web site, you will be prompted to enter information as it appears on your tax return. It is important that you complete this section exactly as it appears on your tax return or your information may not match with IRS records and the data retrieval may not go through.

Once the IRS has authenticated your identity, your IRS tax information will display. You may then choose to transfer your information from the IRS into your FAFSA by checking the "Transfer My Tax Information into the FAFSA" and clicking "Transfer Now" button (see below).

	My Tax Information	FAFSA Question Numbers
Tax Year	<2011>	Questions 79
Name (s)	<Joe & Jane>	This question asks whether or not your parents have filed or will file a 2011 income tax return. If you are now married (or have been married in 2011), answer this question about them as
Social Security Number	<***-**-6789>	
Filing Status	<Married if Joint Return>	
Type of Tax Return Filed	<1040>	Questions 80-81 on the FAFSA
Adjusted Gross Income	<\$18,791>	Questions 82-83 on the FAFSA
Income Tax	<\$1,400>	Questions 84-85 on the FAFSA
IRS Exemptions	<0>	Questions 86-87 on the FAFSA
Educational Credits	<\$2,000>	Questions 88-89 on the FAFSA
IRS Deductions and Payments	<\$2,000>	Questions 90-91 on the FAFSA
Tax Exempt Interest Income	<\$2,000>	Questions 92-93 on the FAFSA
Unearned IRA Distributions	<\$2,000>	Questions 94-95 on the FAFSA
Unearned Pensions	<-\$2,000>	Questions 96-97 on the FAFSA

Print this page for your records before choosing an option below.

**Transfer My Tax Information into the FAFSA**  
 The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information. **Transfer Now**

**Do Not Transfer My Tax Information and Return to the FAFSA**  
 By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use the tax information to input the data into your FAFSA. **Do Not Transfer**

After you have transferred your data, you will be returned to the FOTW website to finish your application. Make sure not to change any of the financial data that was imported from the IRS Website. Remember that both you and your parents (if applicable) will need to go through a separate authentication process when filling out the Student Financial Information & the Parent Financial Information sections of the FAFSA.



## What Is Verification & How Does It Affect You?

The federal government uses a process called **verification** to help determine the accuracy of the financial information on your FAFSA. When applications are selected for verification, the Financial Aid Office must collect certain documents from you and your family and match them against the information you provided on your FAFSA. If your application needs to be verified, the Financial Aid Office will send you an e-mail to your Lehman e-mail address asking you to provide documentation of your application information and complete a "Verification Worksheet". CUNYfirst's Student Center will also note on the 'To Do List' if documents are required to be submitted. You will have to submit the requested items of documentation before you receive any payments of federal financial aid.

### Tax Filers

If you or your parents did not or could not use the IRS Data Retrieval option when you completed your FAFSA, or manually changed any information transferred from IRS records to your FAFSA, you will have to submit an IRS Tax Transcript as one of the required documents in order to complete verification. We can no longer accept copies of tax returns that you or your tax preparer completed. Learn how to obtain a free tax transcript on p. 5.

The image shows two documents. On the left is the '2012-13 VERIFICATION WORKSHEET Federal Student Aid Program' with sections for 'What is Verification?', 'What You Should Do', and 'A. Student and Family Information'. On the right is the 'Internal Revenue Service' Form 4506-T, 'Request for Transcript of Tax Return', which includes fields for taxpayer information and a list of tax return transcripts to be provided.

### Non-Tax Filers

If you have earnings from work but did not and were not required to file a 2014 federal income tax return, document this income by attaching all W-2 forms and/or 1099s from all sources of employment to the Verification Worksheet.

The image shows a 'W-2 Wage and Tax Statement' form. It includes fields for employer information, employee information, wages, and taxes. The form is divided into several sections for reporting different types of income and deductions.

### Food Stamp Recipients

If you reported that an individual in your household received Food Stamps/SNAP in 2013 or 2014, you must prove that this benefit was received. You can submit a copy of the recipient's benefit. Your SNAP Online Benefit History can be accessed at

<http://www.fns.usda.gov/snap/ebt/online-states.htm>

The image is a screenshot of the SNAP Online Benefit History website. It shows a search interface for 'Supplemental Nutrition Assistance Program' with a list of states and their corresponding SNAP websites. The list includes states like Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Vermont, Virginia, Washington, West Virginia, Wisconsin, and Wyoming.



# Applying for New York State Aid

## **Tuition Assistance Program (TAP)**

When you have finished filing FOTW, click on "Optional Feature — Start your state application" located on the FAFSA Confirmation page to link to New York State's TAP-On-the-Web (TOTW) application. Note: if you are not a New York State resident, this option will not be available to you. TAP gives eligible students full-time and part-time tuition awards to supplement any federal student aid you may be receiving.



- Review and correct the pre-printed answers on your TOTW application & answer any questions that are missing.
- Your federal PIN serves as your signature for the TOTW application.
- If you (or your parents) did not use a PIN to sign your FOTW application, your FAFSA signature page satisfies the TAP signature requirement.
- Lehman's TAP School Code is **1412**
- If you did not complete the TOTW application when you filed your FAFSA, you will be sent an email reminder to file your TOTW application at: <http://www.hesc.org>. You will receive an email TAP Award Notification in 3-4 weeks after completing your application.

## **APTS (Aid to Part-Time Study)**

If you plan to attend Lehman as a part-time student, you may be eligible for a New York State Aid to Part-Time Study (APTS) award. After completing your New York State TAP application, you will need to complete a CUNY supplement form to be considered for this award.

- Log on to your CUNYfirst account
- Located in the Student Center listed under Finances and Financial Aid click Supplement Form
- Complete the Form and click SAVE button to submit the form.



## **For More Information**

Learn more about the opportunities available to finance your college education by visiting Lehman's Office of Financial Aid Website at

<http://www.lehman.edu/financial-aid>



***Do you have a question about your financial aid application or award status?***

E-mail us at: [financial.aid@lehman.cuny.edu](mailto:financial.aid@lehman.cuny.edu) and we will respond promptly to your inquiry. (usually by the next business day).

College Contact Information

Office of Financial Aid	Room Sh-136	718-960-8545
Financial Aid Web Lab	Room Sh-131A	718-960-8620
Admissions Office	Room Sh-161	718-960-8706
Bursar Office	Room Sh-031	718-960-8573
Registrar Office	Room Sh-114	718-960-8613
FACTS/DegreeWorks Office	Room Sh- 108	718-960-8526
Scholarship Office	Room Sh-205	718-960-8516