

IMPORTANT NEWS

FILING YOUR 2017-18 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 2017, Fall 2017 & Spring 2018 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

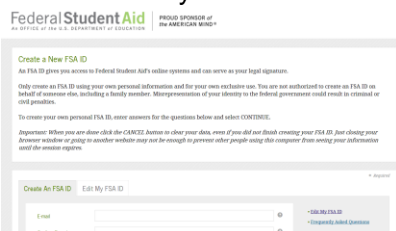
Collect these items and documents

- 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](#).



Federal Student Aid
OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

Create a New FSA ID
An FSA ID gives you access to Federal Student Aid's online systems and can serve as your legal signature.
Only create an FSA ID using your own personal information and for your own exclusive use. You are not authorized to create an FSA ID on behalf of someone else, including a family member. Misrepresentation of your identity to the federal government could result in criminal or civil penalties.
To create your own personal FSA ID, enter answers for the questions below and select CONTINUE.
Important: When you are done click the **CANCEL** button to clear your data, even if you did not finish creating your FSA ID. Just clearing your answers is not enough to prevent other people using this computer from seeing your information about the website again.

Create An FSA ID Edit My FSA ID [Request](#)

Email	<input type="text"/>	<input type="button" value="GO"/>	-SIGN UP TODAY
Confirm Email	<input type="text"/>	<input type="button" value="GO"/>	-COMPARE SAVED QUESTIONS

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 "2017-2018 FAFSA" from the application choices
- When prompted, sign the application with your FSA ID and password.
- **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 (mm/dd/yyyy)', and 'DSS 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 blanks (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 Personal Info', 'School Selection', 'Dependency Status', 'Parent Personal Info', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The main content area has a blue header 'School Selection' and contains a message: 'Congratulations, 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 search form that includes fields for 'State' (a dropdown menu), 'City', 'School Name', and 'Federal School Code'. There are 'SEARCH' buttons and a 'Search Tips' link.

- 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

***Please note – as of the time of this posting, the IRS Data Retrieval Tool is not available.**

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:

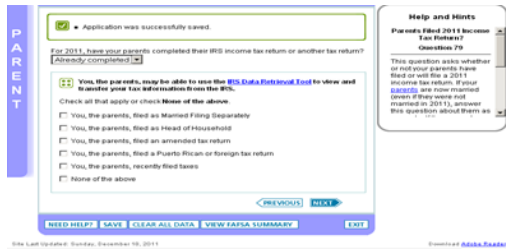
- Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after your return is filed.
- Data from paper tax returns will be available in 6-8 weeks.
- There are 2 separate Financial Information sections on the FAFSA. You will use this tool for the Student Financial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

Parent <YYYY> Federal Income Tax Information

The information below is your tax information that will help you answer a series of questions on the FAFSA.

My Tax Information	FAFSA Question Numbers
Tax Year	
Name (s)	~Joe & Jane
Social Security Number	****-**-****
Filing Status	~Married (if filed Joint Return)
Type of Tax Return Filed	~1040
Adjusted Gross Income	~\$10,795
Income Tax	~\$31,400
IRS Exemptions	~0
Educational Credits	~\$2,500
IRA Deductions and Payments	~\$2,500
Tax-Exempt Interest Income	~\$2,500
Unlinked IRA Distributions	~\$2,500
Unlinked Rollovers	~\$2,500

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.

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 this tax information to input the data into your FAFSA.

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.

2012-13 VERIFICATION WORKSHEET
Federal Student Aid Programs

What is Verification?
Your application was selected by the U.S. Department of Education for review in a process called "verification". The Office of Financial Aid will contact you and your family to confirm the accuracy of the information you provided on your FAFSA.

What You Should Do

- Check to see if you are a **DEPENDENT STUDENT** or an **INDEPENDENT STUDENT**. If you are a dependent student, you must provide information about your parents and family. If you are an independent student, you must provide information about your financial situation.
- Provide the requested information to the Financial Aid Office. You may need to provide copies of tax transcripts, bank statements, and other documents.
- Sign the completed verification worksheet and return it to the Financial Aid Office.
- Submit the completed verification worksheet to the Financial Aid Office.

INDEPENDENT STUDENTS: On the page that you will use to request an appeal between July 1, 2012 and June 30, 2013, you will need to provide information about your financial situation.

DEPENDENT STUDENTS: You must provide information about your parents and family. You must provide copies of tax transcripts, bank statements, and other documents.

NAME	AGE	RELATIONSHIP	COLLEGE	DATE

Internal Revenue Service
United States Department of the Treasury

How Product Contact, Selection, Transmittal, Taxpayer, Status

Return Information

NAME: [REDACTED] STATE: [REDACTED]

ADDRESS: [REDACTED]

FORM: [REDACTED]

PERIOD: [REDACTED]

DATE: [REDACTED]

STATUS: [REDACTED]

FILED: [REDACTED]

RECEIVED: [REDACTED]

DATE: [REDACTED]

TIME: [REDACTED]

PLACE: [REDACTED]

MARKED FILING UNIT

Non-Tax Filers

If you have earnings from work but did not and were not required to file a 2015 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.

Employer identification number (EIN) (OMB No. 1545-0046)		New information: Is your employer an independent contractor, a sole proprietor, or a partner in a partnership? (If "Yes," enter the EIN of the partnership, sole proprietorship, or partnership.)	
Employer's name, address, and ZIP code	Employer's federal tax classification	Employer's social security number	Employer's federal name and EIN
Employer's social security number	Employer's federal name and EIN	Employer's state name and EIN	Employer's state name and EIN
Employer's address and ZIP code	Employer's state name and EIN	Employer's state name and EIN	Employer's state name and EIN

W-2 Wage and Tax Statement
Department of the Treasury—Internal Revenue Service

Food Stamp Recipients

If you reported that an individual in your household received Food Stamps/SNAP in 2015, you may be asked to 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>



Other Verification Items

Depending on your individual circumstances, you may be asked to confirm or document the correctness of additional FAFSA data items before your application can be finalized. If you are required to submit additional information for verification, you will receive notification from the Financial Aid Office.

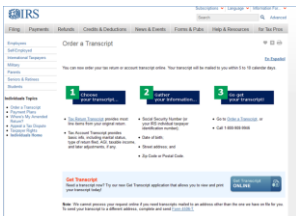


How To Request a Free IRS Tax Return Transcript

If you, your spouse (if married) or your parents (if dependent) need to document your taxable income to fulfill verification requirements, you can request an IRS Tax Return Transcript free of charge. Remember that we can no longer accept copies of the tax returns that you or your tax preparer completed. You may only submit documents that come directly from the IRS to complete verification of your tax return information. There are two ways to request a tax transcript from the IRS.

Online Request

The IRS website has been updated to allow for tax filers to obtain a copy of their transcript online. When families go to the IRS webpage to order a transcript (www.irs.gov/transcript), they are now presented with the new Get Transcript Online button. The Get Transcript button will be the preferred method for obtaining an IRS Tax Return Transcript. The filer will simply go to www.irs.gov/transcript. After user authentication, students or parents will provide the reason for the request, select the year(s), type(s) of information requested, and other requested information, and the document will be displayed in a printable format.



Telephone Request

Call the IRS at 1-800-908-9946. Follow the prompts to enter required information and select IRS Tax Return Transcript option. If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days from the time the IRS receives the request.



CUNYfirst and Your Financial Aid

In addition to viewing your pending, approved and disbursement financial aid award information, you may accept/decline work-study and loan awards (note: all grants and scholarships are automatically accepted), view requested information that is required to complete the award processing and view what financial aid has been applied toward your tuition/fee balance.

- Log on to your CUNYfirst account
- Located in the Student Center listed under Finances and Financial Aid select various financial aid options, i.e. view Financial Aid, accept/decline awards, etc
- To view account balance (Total Due) after awards have been applied toward bill select Account Inquiry
- Review 'To Do List' to determine if any documents need to be submitted to complete the financial aid process
- For additional CUNYfirst information go to:
<http://www.cuny.edu/about/administration/offices/CIS/CUNYfirst/training/students.html>



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.

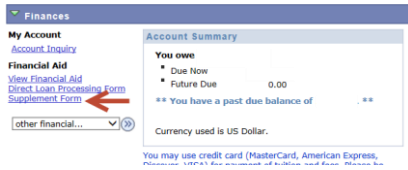


- Review and correct the pre-printed answers on your TOTW application & answer any questions that are missing.
- Your federal PIN serves as your signature for the TOTW application.
- If you (or your parents) did not use a PIN to sign your FOTW application, your FAFSA signature page satisfies the TAP 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 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-102	718-960-8613
FACTS/DegreeWorks Office	Room Sh- 102	718-960-8526
Scholarship Office	Room Sh-205	718-960-8516