

## 2018-2019 EOP Financial Eligibility Worksheet

### STEP 1 – Student Information

<i>Last Name</i>	<i>First Name</i>	<i>Student ID Number</i>	
<i>Permanent Address</i>	<i>Street &amp; Number</i>	<i>City/State/Zip</i>	<i>Date of Birth</i>
(            )            -			
<i>Phone Number (Include Area Code)</i>		<i>Email Address</i>	

### STEP 2 – Family Information

List below the people that your parents will support between July 1, 2018 and June 30, 2019. Include:

- yourself, even if you don't live with your parents
- your parent(s) – (including stepparent)
- your parent(s)' other children (even if they don't live with your parent(s), and (a) your parent(s) provide more than half of their support or (b) if they would be required to give parental information when applying for Federal student aid.)

Include other people as part of your family only if:

- they now live with your parent(s) and received more than half of their support from your parent(s) **AND**
- they will continue to get more than half of their support from July 1, 2018 through June 30, 2019

Full Name	Age	Relationship	Name of College/Degree Program * (If at least half-time 2018-2019)
		<i>Self</i>	<i>SUNY Cobleskill</i>

*\*parent college information is not required*

### STEP 3 – Supplemental Nutrition Assistance Program (SNAP)

Did someone in your parent(s)' household (listed in Step 2) receive SNAP Benefits in 2016 or 2017?

*Check only one box below.*

- ☐ **YES**, one of the persons listed in Step 2 of this worksheet received SNAP benefits in 2016 and/or 2017.  
(Attach documentation showing that you qualified for SNAP.)
- ☐ **NO**, none of the persons listed in Step 2 of this worksheet received SNAP benefits in 2016 and/or 2017.

#### STEP 4 – Public Assistance

Did someone in your parent(s)' household (listed in Step 2) receive Public Assistance in 2016 and/or 2017?  
*Check only one box below.*

- ☐ **YES**, one of the persons listed in Step 2 of this worksheet received Public Assistance in 2016 and/or 2017.  
☐ **NO**, none of the persons listed in Step 2 of this worksheet received Public Assistance.

#### STEP 5 – Social Security Benefits

Did someone in your parent(s)' household (listed in Step 2) receive Social Security Benefits in 2016?  
*Check only one box below.*

- ☐ **YES**, one of the persons listed in Step 2 of this worksheet received Social Security Benefits in 2016.  
(Attach a copy of the 1099-SSA for all family members who received Social Security Benefits.)  
☐ **NO**, none of the persons listed in Step 2 of this worksheet received Social Security Benefits.

#### STEP 6 – Untaxed Income or Benefits

Did someone in your parent(s)' household (listed in Step 2) receive untaxed income or Benefits in 2016?  
*Check only one box below.*

- ☐ **YES**, one of the persons listed in Step 2 of this worksheet received Untaxed income or Benefits in 2016 such as disability or workers' compensation. (Attach a statement from the agency benefits are received from.)  
☐ **NO**, none of the persons listed in Step 2 of this worksheet received any untaxed income or benefits.

#### STEP 7 – Child Support

*Check only one box below for each question.*

Did you or your parent(s) listed in Step 2 of this worksheet **PAY** child support for the year of 2016?

- ☐ **YES** (complete table below)    ☐ **NO**

Did you or your parent(s) listed in Step 2 of this worksheet **RECEIVE** child support for the year of 2016?

- ☐ **YES** (complete table below)    ☐ **NO**

AMOUNT of Child Support Paid or Received	Name of WHO Child Support Was Paid or Received To	NAME and AGE of Child Paying or Receiving Support For

#### STEP 8 – Verifying Income Information

**According to federal regulations schools will no longer be able to accept photocopies of tax returns.** You must submit a **2016 IRS Tax Return Transcript**. To request an IRS Tax Return Transcript visit [www.irs.gov](http://www.irs.gov) and use Form 4506-T, or go to the "Get Your Tax Record" then select "Get Transcript by Mail", or call 800-908-9946. Be sure to only request a Tax **Return** Transcript, NOT an Account Transcript. Please contact the Financial Aid Office if you have had a change in income that is not reflected on your FAFSA.

**DO NOT LEAVE ANY QUESTIONS UNANSWERED.  
YOU MUST "CHECK" A BOX FOR EACH QUESTION.**

**STEP 9 – Student's Income Information**

Did you work in 2016?

- ☐ Yes  
☐ No

Check **ONLY** one box below. See "Verifying Income Information" Step 8 on how to request your IRS Tax Return Transcript.

- ☐ Check here if you did file a 2016 Federal Tax Return and you used the IRS Data Retrieval process when completing/updating you 2018-2019 FAFSA.  
    ☐ Attach a copy of your W-2(s)
- ☐ Check here if you did file a 2016 Federal Tax Return and a 2016 Federal Tax Return Transcript is attached. (See Step 8)  
    ☐ Attach a copy of your W-2(s)
- ☐ Check here if you did **NOT** file a 2016 Federal Tax Return and weren't required to.  
    ☐ If you did not file a 2016 Federal Tax Return but did work in 2016 and had earnings, please state the name of your employer(s) below and the total amount earned in 2016  
    ☐ Attach a copy of your W-2(s)

Total Amount Earned in 2016 from employment: \_\_\_\_\_

Employer's Name(s) \_\_\_\_\_

**STEP 10 – Parent or Spouse Income Information**

Did you work in 2016?

- ☐ Yes  
☐ No

Check **ONLY** one box below. See "Verifying Income Information" Step 8 on how to request your IRS Tax Return Transcript.

- ☐ Check here if you did file a 2016 Federal Tax Return and you used the IRS Data Retrieval process when completing/updating you 2018-2019 FAFSA.  
    ☐ Attach a copy of your W-2(s)
- ☐ Check here if you did file a 2016 Federal Tax Return and a 2016 Federal Tax Return Transcript is attached. (See Step 8)  
    ☐ Attach a copy of your W-2(s)
- ☐ Check here if you did **NOT** file a 2016 Federal Tax Return and weren't required to.  
    ☐ If you did not file a 2016 Federal Tax Return but did work in 2016 and had earnings, please state the name of your employer(s) below and the total amount earned in 2016  
    ☐ Attach a copy of your W-2(s)

Total Amount Earned in 2016 from employment: \_\_\_\_\_

Employer's Name(s) \_\_\_\_\_

**STEP 11 – Sign This Worksheet**

By signing this worksheet, I certify all the information reported is complete and correct:

\_\_\_\_\_  
Student Signature\_\_\_\_\_  
Date\_\_\_\_\_  
Parent Signature (IF student is dependent) / Spouse Signature (IF student is married)\_\_\_\_\_  
Date

## **STEP 9 - VERIFYING INCOME INFORMATION**

**According to federal regulations, schools will no longer be able to accept photocopies of tax returns.** The best way to verify income is by using the **IRS Data Retrieval Tool** when completing or updating your FAFSA on the web. If you do not use this method when completing or updating your FAFSA you must submit a **2016 IRS Tax Return Transcript**. To request an IRS Tax Return Transcript visit [www.irs.gov](http://www.irs.gov) and use Form 4506-T, or go to the “Tools” section on their website and click on “Get Your Tax Record”, or call 800-908-9946. Be sure to only request a Tax **Return** Transcript, NOT an Account Transcript. After using the IRS Data Retrieval, tool students are advised to **not** make any changes to either parent(s)/student’s income information on their FAFSA. Please contact the Financial Aid Office if you have had a change in income that is not reflected on your FAFSA.

### **How to Use the IRS Data Retrieval Tool?**

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA. To use the Data Retrieval Tool, complete the following steps:

1. Go to [fafsa.ed.gov](http://fafsa.ed.gov) and select the “Start Here” button
2. Log in using your FSA ID
3. Select the “Continue” or “Make a Correction” button
4. Select the "Financial Information" tab from the top of the page.

#### **Instructions for the parent to request the parent IRS information:**

1. Go to "Parent Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, select which parent is providing information on the FAFSA
4. Enter the FSA ID for the parent providing the information
5. Click "Link to IRS"
6. Review the information displayed and select the “Transfer My Information into the FAFSA” option

#### **Instructions for the student to request the student IRS information:**

1. Go to "Student Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, click "Link to IRS"
4. Review the information displayed and select the “Transfer My Information into the FAFSA” option
5. Proceed to the Sign and Submit page

**DO NOT LEAVE ANY QUESTIONS UNANSWERED.  
YOU MUST “CHECK” A BOX FOR EACH QUESTION.**