



BOWLING GREEN STATE UNIVERSITY

Student Financial Aid and Scholarships

Untaxed Income Clarification Form 2022-2023

The U. S. Department of Education requires the resolution of conflicting information prior to awarding federal financial aid. To clarify a conflict regarding information you reported or left blank on the Free Application for Federal Student Aid (FAFSA), please complete this form and return it using one of the ways listed at the bottom of the form.

Instructions: Complete each section below as indicated.

- Students required to report their parent's information on the FAFSA (**dependent students**), should complete Sections A, B, D and E.
- Students who were not required to report their parent's information on the FAFSA (**independent students**), should complete Sections A, C, D and E.

Do **NOT** include any of the following sources of income when completing the charts below:

- Amount on W-2 Box 12a through 12d with code DD
- Foster care or adoption payments
- Extended foster care benefits
- Student aid
- Earned income credit
- Additional child care tax credit
- Welfare payments
- Untaxed Social Security benefits
- Supplemental Security Income
- Workforce Innovation an Opportunity Act educational benefits
- *On-base* military housing or a military housing allowance, combat pay
- Benefits from flexible spending arrangements (e.g., cafeteria plans)
- Foreign income exclusion
- Credit for federal tax on special fuels
- Pension or IRA distribution rollovers

A. STUDENT INFORMATION

Last Name

First Name

M. I.

BGSU ID Number

Phone Number

B. UNTAXED INCOME INFORMATION FOR 2020 – DEPENDENT STUDENTS

Type of Income	Student	Parent 1	Parent 2
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings). Including but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$	\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1 – total of lines 15 + 19.	\$	\$	\$
Child support received for any of your children.	\$	\$	\$
Tax exempt interest income from IRS Form 1040 – line 2a.	\$	\$	\$
Untaxed portions of IRA distributions and pensions from IRS Form 1040 (lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers. If negative, enter \$0.	\$	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$	\$	\$
Veteran's non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$	\$

Type of Income	Student	Parent 1	Parent 2
Other untaxed income not reported above, such as worker's compensation, disability benefits, etc. If applicable, include the untaxed portion of health savings accounts (HSA) from IRS Form 1040 Schedule 1 – line 12.	\$	\$	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.	\$	NA	NA

C. UNTAXED INCOME INFORMATION FOR 2020 – INDEPENDENT STUDENTS

Type of Income	Student	Spouse
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1 – total of lines 28 + 32.	\$	\$
Child support received for any of your children.	\$	\$
Tax exempt interest income from IRS Form 1040 – line 2A.	\$	\$
Untaxed portions of IRA distributions and pensions from IRS Form 1040 line (lines 4a + 5a) minus (lines 4b + 5b). Excluded rollovers. If negative, enter a zero.	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$	\$
Veteran's non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income not reported above, such as worker's compensation, disability benefits, etc. If applicable, include the untaxed portion of health savings accounts (HSA) from IRS Form 1040 Schedule 1 – line 25.	\$	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.	\$	NA

D. SIGN THIS WORKSHEET

Each person signing this form certifies that all the information reported is complete and accurate. If you are a dependent, at least one parent must provide a signature and date. If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student _____	Date _____	Parent (of Dependent student) _____	Date _____
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E. SUBMIT THIS WORKSHEET:

UPLOAD & SUBMIT completed SFA forms at: <http://sfa.bgsu.edu/upload>

or

FAX THIS WORKSHEET TO: 419-372-0404
(allow 2-3 business days for processing)

HAVE QUESTIONS?

If you need assistance completing this form you may contact a financial aid advisor by calling 419-372-2651, M-F, 8:00 am – 5:00 pm.

Ask your question online using our secure web portal at:
<https://sfa.bgsu.edu/asksfa>