



## INSTRUCTIONS: DREAM Dependent Verification Worksheet (V1)

**Step 1: Household Information-** List the people in your parent(s) household, include:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parent(s).
- Your parent(s) other children, even if they don't live with your parent(s), if your parent(s) will provide more than half of their support from July 1, 2021 through June 30, 2022.
- Other people if they live with your parent(s), and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2022.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled at least half time in a degree, diploma, or certificate program at postsecondary educational institution between July 1, 2021 and June 30, 2022. If additional space is needed, attach a separate page.

**Step 2: Student Information-** Check the box that applies and attach appropriate documentation, if applicable

- SECTION 1: Select ONLY if you filed a Federal Tax Return with the IRS
- SECTION 2: Select ONLY if you filed AND amended your taxes
- SECTION 3: Select ONLY if you did not file taxes and were NOT required to file taxes

**Step 3: Parent Information-** Check the box that applies and attach appropriate documentation, if applicable

The instructions apply to the parent information listed on the FAFSA. Notify the Financial Aid Office if your parents filed a separate 2019 IRS Income Tax Returns and/or had a change in marital status at the end of the 2019 tax year.

- SECTION 1: Select ONLY if your parent(s) filed a Federal Tax Return with the IRS
- SECTION 2: Select ONLY if your parent(s) filed AND amended their taxes
- SECTION 3: Select ONLY if your parent(s) did not file taxes and were NOT required to file taxes

### How to request an IRS Tax Return Transcript and/or a Non-filing Status Letter

In order to obtain a 2019 IRS Tax Return Transcript and/or a Non-filing Status Letter, go to [www.irs.gov](http://www.irs.gov) and select the “**Get Your Tax Record**” link or call 1 (800) 829-1040. Make sure to request the “**IRS Tax Return Transcript.**” In most cases, electronic filers can request a 2019 IRS Tax Return Transcript within 2–3 weeks after the 2019 IRS income tax return has been processed by the IRS. Non-electronic filers of 2019 can request the 2019 IRS Tax Return Transcript within 8-11 weeks after the 2019 paper IRS income tax return has been processed by the IRS. *Please do not send original documents to CSUMB.*

<b>Submit all verification documents as one packet by mail or in person* to the Financial Aid Office.</b>		
<b>By Mail:</b> CSUMB Financial Aid Office Student Services Bldg. 47/3rd Floor 100 Campus Center, Seaside CA, 93955	<b>In Person*:</b> CSUMB Financial Aid Office Student Services Bldg. 47/3rd Floor	<b>Questions:</b> Phone: 831-582-5100 Email: <a href="mailto:financial_aid@csumb.edu">financial_aid@csumb.edu</a> Website: <a href="https://csumb.edu/financialaid">https://csumb.edu/financialaid</a>

\* CSUMB remains closed due to the COVID protocols. Please check [csumb.edu](http://csumb.edu) for updates on when in-person services will be available.

### **IMPORTANT:**

If your documents are complete, please allow 2-3 weeks for processing from the date you submit your documents. Documents received will be removed from your “To Do” list in OASIS Student Center. If incomplete, notification will be provided to the student via their CSUMB email. Please follow up with all requests in a timely manner.

**Incomplete verification worksheets will NOT be processed regardless of circumstance. To ensure timely processing of your documents, we strongly encourage you to submit all documents by the priority document deadline listed on the Financial Aid Website.**

**DO NOT SUBMIT THIS PAGE**

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
M.I.

\_\_\_\_\_  
OASIS Student I.D. (000-000-000)



## 2021-2022 DREAM Dependent Verification Worksheet (V1)

Your 2021-2022 Dream Act Application was selected for review in a process called Verification. The law states that before awarding Federal Student Aid, the Financial Aid Office is required to confirm the information you and your parents reported on your Dream Act Application. To verify that you provided correct information, the Financial Aid Office will compare your Dream Act Application with the information on this worksheet and with all other requested documents. If there are differences between your Dream Act Application and the financial documents provided, a financial aid administrator will make corrections to your Dream Act Application as needed. *If you have an unusual circumstance where you were granted a filing extension, are a victim of identity theft, or filed a Non-IRS Income Tax Return, please contact the Financial Aid Office before completing this form.*

- ✓ **SUBMIT COMPLETED** worksheet and required attachments to the Financial Aid Office by the **priority document deadline** listed on the Financial Aid Website: <https://csumb.edu/financialaid>

### STEP 1: Household Information

List the people in your parent(s) household, include:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parent(s).
- Your parent(s) other children, even if they don't live with your parent(s), if your parent(s) will provide more than half of their support from July 1, 2021 through June 30, 2022.
- Other people if they live with your parent(s), and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2022.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled at least half time in a degree, diploma, or certificate program at postsecondary educational institution between July 1, 2021 and June 30, 2022. If additional space is needed, attach a separate page.

Full Legal Name	Age	Relationship to Student	College for 2021-2022	Will be Enrolled at Least Half-Time
		<i>Self</i>	<i>CSUMB</i>	
		<i>Parent</i>	<i>N/A</i>	N/A

Last Name	First Name	M.I.	OASIS Student I.D. (000-000-000)
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**Please do NOT leave this section blank.**

**STEP 2: Student Information (Check the box that applies)**

<p>Select <b><u>ONLY</u></b> if you filed a Federal Tax Return with the IRS</p>	<p><input type="checkbox"/> You filed a 2019 Federal Tax Return with the IRS. As a result, you are required to attach a 2019 IRS Tax Return Transcript with this Federal Verification Worksheet.</p> <p><input type="checkbox"/> Check here to confirm a <b>2019 IRS Tax Return Transcript</b> is attached.</p>
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<p>Select <b><u>ONLY</u></b> if you filed <b><u>AND</u></b> amended your taxes</p>	<p><input type="checkbox"/> You filed and amended your original 2019 Federal Income Tax return with the IRS. As a result, you must attach a 2019 IRS Tax Return Transcript and a signed copy of the 2019 IRS Form 1040X with all schedules filed with the IRS.</p> <p><input type="checkbox"/> Check here to confirm a <b>2019 IRS Tax Return Transcript</b> is attached.</p> <p><input type="checkbox"/> Check here to confirm a <b>signed 2019 IRS 1040X Form and <u>all schedules</u></b> are attached.</p>
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<p>Select <b><u>ONLY</u></b> if you did not file taxes and were <b>NOT</b> required to file taxes</p>	<p><input type="checkbox"/> Check here if you were not employed and had no income earned from work during 2019.</p> <p style="text-align: center;"><b>OR</b></p> <p><input type="checkbox"/> Check here if you were employed and were not required to file during 2019. List every employer even if the employer did not issue an IRS W-2 form and the amount earned from each employer. <b>Attach copies of all 2019 W-2's received.</b></p>
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Employer's Name	Amount Earned in 2019	W-2 or an Equivalent Document Provided?
Example: CSUMB	\$ 2000	Yes
	\$	Yes
	\$	Yes
	\$	Yes

_____	_____	_____
Last Name	First Name	M.I.
		OASIS Student I.D. (000-000-000)

**STEP 3: Parent Information (Check the box that applies)**

Select <b>ONLY</b> if your parent(s) filed a Federal Tax Return with the IRS	<input type="checkbox"/> Your parent(s) filed a 2019 Federal Tax Return with the IRS. As a result, they are required to attach a 2019 IRS Tax Return Transcript with this Federal Verification Worksheet.  <input type="checkbox"/> Check here to confirm a <b>2019 IRS Tax Return Transcript</b> is attached.
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Select <b>ONLY</b> if your parent(s) filed <b>AND</b> amended their taxes	<input type="checkbox"/> Your parent(s) filed and amended their original 2019 Federal Income Tax return with the IRS. As a result, they must attach a 2019 IRS Tax Return Transcript and a signed copy of the 2019 IRS Form 1040X with all schedules filed with the IRS.  <input type="checkbox"/> Check here to confirm a <b>2019 IRS Tax Return Transcript</b> is attached.  <input type="checkbox"/> Check here to confirm a <b>signed 2019 IRS 1040X Form and <u>all schedules</u></b> are attached.
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Select <b>ONLY</b> if your parent(s) did not file taxes and were <b>NOT</b> required to file taxes	<input type="checkbox"/> Check here if your parent(s) were not employed and had no income earned from work during 2019. As a result, you must attach a non-filing status letter from the IRS dated on or after October 2019 that indicates parent did not file.  <input type="checkbox"/> Check here to confirm a <b>non-filing letter</b> is attached.  <p style="text-align: center;"><b>OR</b></p> <input type="checkbox"/> Check here if your parent(s) were employed and did not file during 2019. List every employer even if the employer did not issue an IRS W-2 form and the amount earned from each employer. <b>Attach copies of all 2019 W-2's received.</b>  <input type="checkbox"/> Check here to confirm a <b>non-filing letter</b> is attached.
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Employer's Name	Amount Earned in 2019	W-2 or an Equivalent Document Provided?
Example: CSUMB	\$ 2000	Yes
	\$	Yes
	\$	Yes
	\$	Yes

**REVIEW AND SIGN:**

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. **WARNING:** If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student Signature ( <b>Required</b> )	Date	Student Telephone Number with voicemail
Parent Signature ( <b>Required</b> )	Date	