



INSTRUCTIONS: 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 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.***

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

* CSUMB remains closed due to the COVID protocols. Please check 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. Completed 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 Dependent Verification Worksheet (V1)

Your 2021-2022 Free Application for Federal Student Aid (FAFSA) 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 FAFSA. To verify that you provided correct information, the Financial Aid Office will compare your FAFSA with the information on this worksheet and with all other requested documents. If there are differences between your FAFSA and the financial documents provided, a financial aid administrator will make corrections to your FAFSA 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>	<i>N/A</i>

Please do NOT leave this section blank.

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

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

<p>Select <u>ONLY</u> if you filed a Federal Tax Return with the IRS</p>	<p><input type="checkbox"/> You successfully transferred your 2019 IRS Federal Tax information onto your FAFSA via the online IRS Data Retrieval Tool. If you successfully transferred your 2019 IRS income information, you do not need to attach an IRS Tax Return Transcript to this worksheet. *</p> <p style="text-align: center;">OR</p> <p><input type="checkbox"/> You were unable (OR) chose not to transfer your 2019 IRS Tax Information via the IRS Data Retrieval Tool. 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 2019 IRS Tax Return Transcript is attached.</p>
---	---

<p>Select <u>ONLY</u> if you filed <u>AND</u> 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 2019 IRS Tax Return Transcript is attached OR have successfully used the Data Retrieval Tool on the FAFSA.*</p> <p><input type="checkbox"/> Check here to confirm a signed 2019 IRS 1040X Form and <u>all schedules</u> are attached.</p>
--	---

<p>Select <u>ONLY</u> if you did not file taxes and were NOT 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;">OR</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. Attach copies of all 2019 W-2's received.</p> <table border="1" style="width:100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width:50%;">Employer's Name</th> <th style="width:20%;">Amount Earned in 2019</th> <th style="width:30%;">W-2 or an Equivalent Document Provided?</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Example: CSUMB</td> <td style="text-align: center;">\$ 2000</td> <td style="text-align: center;">Yes</td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td style="text-align: center;">Yes</td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td style="text-align: center;">Yes</td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td style="text-align: center;">Yes</td> </tr> </tbody> </table>	Employer's Name	Amount Earned in 2019	W-2 or an Equivalent Document Provided?	Example: CSUMB	\$ 2000	Yes		\$	Yes		\$	Yes		\$	Yes
Employer's Name	Amount Earned in 2019	W-2 or an Equivalent Document Provided?														
Example: CSUMB	\$ 2000	Yes														
	\$	Yes														
	\$	Yes														
	\$	Yes														

Your IRS Data Retrieval must be successfully processed by the Federal Student Aid Processor **BEFORE submitting this worksheet without a tax return transcript. Your FAFSA transaction on file with the Financial Aid Office must also confirm that you successfully transferred IRS Income Information before we can accept this Verification Worksheet without an IRS Tax Return Transcript.*

