



INSTRUCTIONS: Independent Aggregate Verification Worksheet (V5)

Step 1: Household Information- List the people in your household, include:

- You and your spouse (required, if married).
- You or spouse’s children if the student or spouse will provide more than half of the children’s support from July 1, 2021 through June 30, 2022 even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person’s support, and will continue to provide more than half of that person’s support through June 30, 2022.

Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2021 and June 30, 2022 and include the name of the college.

Step 2: Student Information- Check and fill out ONE section only and attach appropriate documentation, if applicable

- SECTION 1: Select ONLY if you (or your spouse) filed a Federal Tax Return with the IRS
- SECTION 2: Select ONLY if you (or your spouse) filed AND amended your taxes
- SECTION 3: Select ONLY if you (or your spouse) 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.*

Step 3: Identity Verification- Check and fill out ONE option only and attach appropriate documentation, if applicable

- Option A: Please sign in-person at the Financial Aid Office.
- Option B: Please have the documentation notarized.

Step 4: Student High School Completion Status- Please attach appropriate documentation.

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 Independent Aggregate Verification Worksheet (V5)

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 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 household, include:

- You and your spouse (required, if married).
- You or spouse’s children if the student or spouse will provide more than half of the children’s support from July 1, 2021 through June 30, 2022 even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person’s support, and will continue to provide more than half of that person’s support through June 30, 2022.

Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2021 and June 30, 2022, and include the name of the college.

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

SECTION 1:
Select **ONLY** if you (or your spouse) filed a Federal Tax Return with the IRS

You (or your spouse) 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. *

OR

You (or your spouse) 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.

Check here to confirm a **2019 IRS Tax Return Transcript** is attached.

SECTION 2:
Select **ONLY** if you (or your spouse) filed **AND** amended your taxes

You (or your spouse) 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.

Check here to confirm a **2019 IRS Tax Return Transcript** is attached **or** have successfully used the Data Retrieval Tool on the FAFSA.*

Check here to confirm a **signed 2019 IRS 1040X Form and all schedules** are attached.

SECTION 3:
Select **ONLY** if you (or your spouse) did not file taxes and were **NOT** required to file taxes

Check here if you (or your spouse) 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 student did not file.

Check here to confirm a **non-filing letter** is attached.

OR

Check here if you were employed and 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.**

Check here to confirm a **non-filing letter** is attached.

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.*

Last Name

First Name

M.I.

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

STEP 3: Option A (To Be Signed at the Institution)*

* CSUMB remains closed due to the COVID protocols. Please check csumb.edu for updates on when in-person services will be available.

**Identity and Statement of Educational Purpose
(To Be Signed at the Institution)**

The student must appear in person at _____ to
(Name of Postsecondary Educational Institution)

verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending _____ for 2021–2022.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Student's ID Number)

**Verificación de Identidad y Declaración de Propósito Educativo
(Para ser firmadas en la institución)**

For office use only

El estudiante debe comparecer en persona en _____ para
(Nombre de la institución educativa postsecundaria)

verificar su identidad mediante la presentación de una identificación con fotografía (ID) válida emitida por el gobierno que no haya expirado, como una licencia de conducir, otro tipo de identificación emitida por el estado o pasaporte, entre otros. La institución conservará una copia de la identificación con fotografía del estudiante en la cual se anotará la fecha en la que se recibió y revisó, y el nombre del funcionario de la institución autorizado a recibir y revisar las identificaciones de los estudiantes.

Además, el estudiante debe firmar, en presencia del funcionario de la institución, la Declaración de Propósito Educativo proporcionada a continuación.

Declaración de Propósito Educativo

Certifico que yo, _____, soy el individuo que firma esta
[Imprimir nombre del estudiante]

Declaración de Propósito Educativo, y que la ayuda financiera federal estudiantil que yo pueda recibir sólo será utilizada para fines educativos y para pagar el costo de asistir a _____ para 2021–2022.
[Imprimir nombre de institución educativa postsecundaria]

[Firma del estudiante]

[Fecha]

[Número de identificación del estudiante]

Last Name

First Name

M.I.

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

Option B (To Be Signed in the Presence of a Notary)

**Identity and Statement of Educational Purpose
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at _____
(Name of Postsecondary Educational Institution)

to verify his or her identity, the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending _____ for 2021–2022.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Student's ID Number)

**Verificación de Identidad y Declaración de Propósito Educativo
(Para ser firmadas en presencia de un notario)**

Si el estudiante no es capaz de comparecer en persona en _____
(Nombre de la institución educativa postsecundaria)

para verificar su identidad, el mismo debe proporcionar a la institución:

- (a) una copia de la de identificación con fotografía (ID) válida emitida por el gobierno que no haya expirado, que se reconoce en la declaración del notario que aparece a continuación, o que se presenta ante un notario, como una licencia de conducir, otro tipo de identificación emitida por el estado o pasaporte, entre otros; y
- (b) la Declaración de Propósito Educativo original proporcionada a continuación debe ser notarizada. Si la declaración del notario aparece en una página separada de la Declaración de Propósito Educativo, se debe indicar de manera clara que la Declaración de Propósito Educativo era el documento notarizado.

Declaración de Propósito Educativo

Certifico que yo, _____, soy el individuo que firma esta
[Imprimir nombre del estudiante]

Declaración de Propósito Educativo, y que la ayuda financiera federal estudiantil que yo pueda recibir sólo será utilizada para fines educativos y para pagar el costo de asistir a _____ para 2021–2022.
[Imprimir nombre de institución educativa postsecundaria]

[Firma del estudiante]

[Fecha]

[Número de identificación del estudiante]

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

Notary's Certificate of Acknowledgement

Notary's certification may vary by State

State of _____ City/County of _____, On _____, (Date)

before me _____, personally appeared, _____
(Notary's name) (Printed name of signer)

and proved to me on basis of satisfactory evidence of identification _____ to be the
(Type of unexpired government-issued photo ID provided)
 above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary signature)

My commission expires on: _____
(Date)

STEP 4: High School Completion Status

Provide one of the documents listed below to the Financial Aid Office directly. We do not accept copies routed to the Financial Aid Office from any department on campus. Your Financial Aid Award will not be disbursed to your account until an approved document is received **directly** from you.

- A copy of the student's high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

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 **(Required)** Date Student Telephone Number with Voicemail

 Spouse Signature **(Required, if married)** Date