



## INSTRUCTIONS: Independent Verification Worksheet (V1)

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

<p>Select <b><u>ONLY</u></b> if you (or your spouse) filed a Federal Tax Return with the IRS</p>	<p><input type="checkbox"/> 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. *</p> <p style="text-align: center;"><b>OR</b></p> <p><input type="checkbox"/> 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.</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 (or your spouse) filed <b><u>AND</u></b> amended your taxes</p>	<p><input type="checkbox"/> 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.</p> <p><input type="checkbox"/> Check here to confirm a <b>2019 IRS Tax Return Transcript</b> is attached <b>or</b> have successfully used the Data Retrieval Tool on the FAFSA. *</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 (or your spouse) did not file taxes and were <b>NOT</b> required to file taxes</p>	<p><input type="checkbox"/> 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.</p> <p><input type="checkbox"/> Check here to confirm a <b>non-filing letter</b> is attached.</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> <p><input type="checkbox"/> Check here to confirm a <b>non-filing letter</b> is attached.</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

*\*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.*

**REVIEW AND SIGN:**

Each person signing below certifies that all of the information reported is complete and correct. **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
Spouse Signature ( <b>Required, if married</b> )	Date	