



Student Last Name	Student First Name
OASIS Student ID (000-000-000)	For Financial Aid Office Use Only

2022 - 2023 Verification Worksheet V1 - Dependent Students

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called Verification. The Financial Aid Office is required to confirm the information you and your parents reported on your FAFSA by comparing your FAFSA with the information on this worksheet and 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.*

To request an 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.**” You can also complete and submit a 4506-T form. In most cases, electronic filers can request a 2020 IRS Tax Return Transcript within 2–3 weeks after the return has been processed by the IRS. Non-electronic filers can request the 2020 IRS Tax Return Transcript within 8-11 weeks after the paper tax return has been processed by the IRS. **Please do not send original documents to CSUMB.**

If you used the Data Retrieval Tool (DRT), the Financial Aid Office may need to confirm that you successfully transferred IRS Income Information. In some cases, an IRS Tax Return Transcript may be required.

Submit all documents as one packet by mail or in person:

By Mail: CSUMB Financial Aid Office 100 Campus Center Seaside, CA 93955	In Person: CSUMB Financial Aid Office Student Services Building 47 3rd Floor	Questions: Phone: (831) 582-5100 Email: financial_aid@csumb.edu Website: csumb.edu/financialaid
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If your documents are complete, please allow 2-3 weeks for processing. During the peak period from March to August, processing may take up to 5 weeks. 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. To ensure timely processing of your documents, we strongly encourage you to submit all documents by the priority document deadline date listed on the financial aid website.

Part 1: Household Information

List yourself and the people in your parent(s) household for whom your **parents will provide more than half of their support from July 1, 2022 to June 30, 2023.** Attach additional pages if necessary. Please include:

- Your parent(s) (including stepparent) even if you don't live with your parent(s).
- Your parent(s) other children, if the parents will provide more than half of the children's support from July 1, 2022, through June 30, 2023, or if the other children would be required to provide parental information if they were completing a FAFSA for 2022-2023. Include children who meet either of these standards even if they don't live with your parent(s)
- Other people if they now live with your parent(s) and your parents provide more than half of that persons' support through June 30, 2023.

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, 2022 and June 30, 2023.

For household members (excluding your parents) enrolled at a postsecondary institution:

Relationship to Student	Full Legal Name	Age	Enrolled at least 1/2 Time?	Name of College
Self			<input type="checkbox"/> Yes <input type="checkbox"/> No	CSUMB
Parent			<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	N/A
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

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Part 2: Student Information (Check the box that applies and attached required items)

<input type="checkbox"/>	Select if you filed a Federal Tax Return with the IRS and successfully transferred your 2020 IRS Federal Tax information onto your FAFSA via the online IRS Data Retrieval Tool.		
<input type="checkbox"/>	Select if you filed a Federal Tax Return with the IRS and you were unable or chose not to transfer your 2020 IRS Tax Information via the IRS Data Retrieval Tool. You must attach a 2020 IRS Tax Return Transcript		
<input type="checkbox"/>	Select if you filed AND amended your original 2020 Federal Tax Return with the IRS and used the Data Retrieval Tool (DRT) on the FAFSA. You must attach a signed 2020 IRS Form 1040X with all schedules filed with the IRS.		
<input type="checkbox"/>	Select if you filed AND amended your original 2020 Federal Tax Return with the IRS but did NOT use the Data Retrieval Tool (DRT) on the FAFSA. You must attach a 2020 IRS Tax Return Transcript and a signed 2020 IRS Form 1040X with all schedules filed with the IRS.		
<input type="checkbox"/>	Select if you did not file taxes and were NOT required to file taxes because you were not employed and had no income earned from work during 2020		
<input type="checkbox"/>	Select if you did not file taxes and were NOT required to file taxes because you were employed and were not required to file during 2020. 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 2020 W-2's		
	Employer Name	Amount Earned in 2020	W2 or equivalent provided?
	Example: CSUMB	\$2000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

Part 3: Parent Information (Check the box that applies and attached required items)

<input type="checkbox"/>	Select if your parent(s) filed a Federal Tax Return with the IRS and successfully transferred their 2020 IRS Federal Tax information onto your FAFSA via the online IRS Data Retrieval Tool.		
<input type="checkbox"/>	Select if your parent(s) filed a Federal Tax Return with the IRS and were unable or chose not to transfer their 2020 IRS Tax Information via the IRS Data Retrieval Tool. You must attach your parent(s) 2020 IRS Tax Return Transcript		
<input type="checkbox"/>	Select if your parent(s) filed AND amended their original 2020 Federal Tax Return with the IRS and used the Data Retrieval Tool (DRT) on the FAFSA. You must attach your parent(s) signed 2020 IRS Form 1040X with all schedules filed with the IRS.		
<input type="checkbox"/>	Select if your parent(s) filed AND amended their original 2020 Federal Tax Return with the IRS but did NOT use the Data Retrieval Tool (DRT) on the FAFSA. You must attach your parent(s) 2020 IRS Tax Return Transcript and their signed 2020 IRS Form 1040X with all schedules filed with the IRS.		
<input type="checkbox"/>	Select if your parents (s) did not file taxes and were NOT required to file taxes because they were not employed and had no income earned from work during 2020 . You must attach your parent(s) Non-Filing Letter.		
<input type="checkbox"/>	Select if your parent(s) did not file taxes and were NOT required to file taxes because they were employed and were not required to file during 2020. List every employer even if the employer did not issue an IRS W-2 form and the amount earned from each employer. You must attach your parent(s) Non-Filing Letter and copies of all 2020 W-2's		
	Employer Name	Amount Earned in 2020	W2 or equivalent provided?
	Example: CSUMB	\$2000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

Review & Sign

The student and parent whose information was reported on the FAFSA must sign and date, certifying that the information reported is complete and correct. **WARNING:** Purposely giving false or misleading information may lead to fines, prison, or both.

Student Signature (Required)

Date

Student Phone # with voicemail

Parent Signature (Required)

Date