



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

## 2022 - 2023 Verification Worksheet V1 - Independent 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 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](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.”** 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:

<b>By Mail:</b> CSUMB Financial Aid Office 100 Campus Center Seaside, CA 93955	<b>In Person:</b> CSUMB Financial Aid Office Student Services Building 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="http://csumb.edu/financialaid">csumb.edu/financialaid</a>
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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 listed on the financial aid website.**

### Part 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, 2022 through June 30, 2023 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, 2023.

Include the name of the college for any household member who is or 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 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
			<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	
			<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"/>	<b>Select if you filed a Federal Tax Return with the IRS</b> and successfully transferred your 2020 IRS Federal Tax information onto your FAFSA via the online IRS Data Retrieval Tool.												
<input type="checkbox"/>	<b>Select if you filed a Federal Tax Return with the IRS</b> and you were unable or chose not to transfer your 2020 IRS Tax Information via the IRS Data Retrieval Tool. <b>You must attach a 2020 IRS Tax Return Transcript.</b>												
<input type="checkbox"/>	<b>Select if you filed AND amended your original 2020 Federal Tax Return with the IRS</b> and used the Data Retrieval Tool (DRT) on the FAFSA. <b>You must attach a signed 2020 IRS Form 1040X with all schedules filed with the IRS.</b>												
<input type="checkbox"/>	<b>Select if you filed AND amended your original 2020 Federal Tax Return with the IRS</b> but did NOT use the Data Retrieval Tool (DRT) on the FAFSA. <b>You must attach a 2020 IRS Tax Return Transcript and a signed 2020 IRS Form 1040X with all schedules filed with the IRS.</b>												
<input type="checkbox"/>	<b>Select if you did not file taxes and were NOT required to file taxes</b> because you were not employed and had no income earned from work during 2020. <b>A Non-Filing Letter from the IRS must be attached.</b>												
<input type="checkbox"/>	<p><b>Select if you did not file taxes and were NOT required to file taxes</b> 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. <b>Attach copies of all 2020 W-2's and a Non-Filing Letter from the IRS.</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 45%;">Employer Name</th> <th style="width: 25%;">Amount Earned in 2020</th> <th style="width: 30%;">W2 or equivalent provided?</th> </tr> </thead> <tbody> <tr> <td>Example: CSUMB</td> <td>\$2000</td> <td style="text-align: center;"><input checked="" type="checkbox"/> Yes    <input type="checkbox"/> No</td> </tr> <tr> <td>_____</td> <td>_____</td> <td style="text-align: center;"><input type="checkbox"/> Yes    <input type="checkbox"/> No</td> </tr> <tr> <td>_____</td> <td>_____</td> <td style="text-align: center;"><input type="checkbox"/> Yes    <input type="checkbox"/> No</td> </tr> </tbody> </table>	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
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
Spouse Signature (Required , if married)	Date	