

2020-2021 Institutional Verification - DEPENDENT

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|--|------------------------------|
| Name: _____ | |
| Date of Birth: _____ | MSU Denver ID#: _____ |
| E-mail: _____ | Phone Number: _____ |
| I affirm that I have read, understood, and agreed to this form in its entirety and that the information supplied is true and complete. | |
| Student Signature: _____ | Date: _____ |
| Parent Signature: _____ | Date: _____ |

Your application was selected by **The Department of Education** for review in a process called **verification**. In this process, we are required by federal regulation to verify information from your 2020-2021 FAFSA application before you can receive any federal or state aid.

FORM REQUIREMENTS:

- Student and parent **MUST** provide **handwritten signatures**. We cannot accept electronic signatures.
- Only **complete documentation** will be accepted. Label each document with your **name** and **900#**.
- When submitting required documentation for tax filers, the preferred methods are: the **IRS Data Retrieval Tool (DRT) within the FAFSA online** or the **IRS Tax Return Transcript**.
- If the IRS DRT is not used and the Tax Return Transcript cannot be obtained from the IRS, a **SIGNED** copy of the 1040 Tax Return with Applicable Schedules may be accepted.

I. PARENT MARITAL STATUS: Check the gray box next to the **CURRENT** marital status of parent(s).

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| | SINGLE / NEVER MARRIED |
| | MARRIED / REMARRIED |
| → | If parents are married (whether biological or step-parent), you are REQUIRED to provide tax information for BOTH parents (ex: 2018 joint tax return transcript <u>OR</u> individual tax return transcript from each parent if not yet married in 2018) |
| | DIVORCED / SEPARATED / WIDOWED |
| → | If your parent filed a joint tax return in 2018 but is now divorced/separated/widowed, you are REQUIRED to submit the joint tax return transcript <u>AND</u> the 2018 W-2s for the parent whose information is listed on the FAFSA. The W-2s will be used separate income from the joint return and account for only 1 parent's income information. |
| | UNMARRIED LIVING TOGETHER |
| → | If your BIOLOGICAL parents are NOT married but are currently living together, you are REQUIRED to provide tax information for BOTH parents (ex: individual tax return transcript from each parent). |

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II. PARENT INCOME VERIFICATION: Check the gray box next to **PARENT 1** and/or **PARENT 2** beneath the **ONE** statement that most accurately describes the 2018 income tax information for PARENT(S). Attach all **REQUIRED** documentation specified beneath the applicable statement.

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|---|--------------------------------------|
| A. Parent(s) did <u>NOT</u> work or file taxes in 2018. | |
| PARENT 1 (as listed on FAFSA) | PARENT 2 (as listed on FAFSA) |
| <p>REQUIRED: Parent(s) MUST submit a Verification of Non-Filing Letter from the IRS. In the letter of non-filing CANNOT be obtained from the IRS, a SIGNED personal statement of non-filing may be accepted.* Check the box that applies.</p> <p><input type="checkbox"/> Parent(s) attached the IRS VERIFICATION OF NON-FILING LETTER.</p> <p><input type="checkbox"/> Parent(s) attached a SIGNED personal statement of non-filing, because they were unable to obtain a letter from the IRS.*</p> <p><small>*A SIGNED personal statement MUST indicate that parent did NOT work and did NOT file taxes in 2018. It MUST also state that parent attempted to order the verification of non-filing letter from the IRS, but the request was unsuccessful.</small></p> | |
| B. Parent(s) earned income in 2018 but were <u>NOT</u> required to file a 2018 tax return. | |
| PARENT 1 (as listed on FAFSA) | PARENT 2 (as listed on FAFSA) |
| <p>REQUIRED: Parent(s) MUST attach 2018 W-2s from each employer <u>AND</u> the IRS Verification of Non-Filing Letter. Parent(s) MUST also list the names of all employers and the amounts earned from each employer in 2018. Check the box that applies.</p> <p><input type="checkbox"/> Parent(s) attached IRS VERIFICATION OF NON-FILING LETTER with ALL 2018 W-2s.</p> <p><input type="checkbox"/> Parent(s) attached a SIGNED personal statement of non-filing* with ALL 2018 W-2s.</p> <p>PARENT 1 (as listed on FAFSA)</p> <p>Employer: _____ 2018 Wages: \$ _____ <input type="checkbox"/> W-2 attached</p> <p>Employer: _____ 2018 Wages: \$ _____ <input type="checkbox"/> W-2 attached</p> <p>PARENT 2 (as listed on FAFSA)</p> <p>Employer: _____ 2018 Wages: \$ _____ <input type="checkbox"/> W-2 attached</p> <p>Employer: _____ 2018 Wages: \$ _____ <input type="checkbox"/> W-2 attached</p> <p><small>*A SIGNED personal statement MUST indicate parent did NOT earn enough income in 2018 to be required to file taxes. It MUST also state that parent attempted to order the verification of non-filing letter from the IRS, but the request was unsuccessful.</small></p> | |
| C. Parent(s) filed a 2018 Tax Return. | |
| PARENT 1 (as listed on FAFSA) | PARENT 2 (as listed on FAFSA) |
| <p>REQUIRED: Parent(s) MUST attach proof of their 2018 tax return by providing ONLY 1 of the 3 options below. Check the box that applies.</p> <p><input type="checkbox"/> Parent(s) utilized the IRS DATA RETRIEVAL TOOL to transfer their 2018 income tax information from the IRS directly to the 2020-2021 FAFSA online.</p> <p><input type="checkbox"/> Parent(s) attached their 2018 IRS TAX RETURN TRANSCRIPT.*</p> <p><input type="checkbox"/> Parent(s) attached a SIGNED copy of their 2018 TAX RETURN with APPLICABLE SCHEDULES.</p> <p><small>*To request an IRS Tax Return Transcript, visit www.irs.gov → Get Tax Record → Get Transcript Online <u>OR</u> call 1-800-908-9946.</small></p> | |

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| D. Parent(s) filed a 2018 1040X Amended Tax Return to make changes to their initial 2018 tax return. | |
| <input type="checkbox"/> PARENT 1 (as listed on FAFSA) | <input type="checkbox"/> PARENT 2 (as listed on FAFSA) |
| <p>REQUIRED: Parents(s) MUST attach proof of their original 2018 tax return AND proof of their 2018 1040X AMENDED tax return. Check the box that applies.</p> <p><input type="checkbox"/> Parent(s) attached their 2018 IRS RECORD OF ACCOUNT TRANSCRIPT, which includes information from the original tax return and the amended tax return.*</p> <p><input type="checkbox"/> Parent(s) attached a SIGNED copy of their 2018 TAX RETURN with APPLICABLE SCHEDULES AND a SIGNED copy of their 2018 1040X AMENDED TAX RETURN.</p> <p>*To request an IRS Record of Account, visit www.irs.gov → Get Tax Record → Get Transcript Online <u>OR</u> call 1-800-908-9946.</p> | |

III. STUDENT INCOME VERIFICATION: Check the gray box next to **STUDENT** beneath the **ONE** statement that most accurately describes your 2018 income tax information. Attach all **REQUIRED** documentation specified beneath the applicable statement.

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| A. I did NOT work in 2018 or file taxes in 2018. | |
| <input type="checkbox"/> STUDENT | |
| <p>REQUIRED: If you did NOT work in 2018, you are REQUIRED to check the box for statement A, but since you are a dependent student, NO additional documentation is required for this option.</p> | |
| B. I earned income in 2018 but was NOT required to file a 2018 tax return. | |
| <input type="checkbox"/> STUDENT | |
| <p>REQUIRED: You MUST attach your 2018 W-2s from each employer <u>AND</u> list the names of all employers and the amounts earned from each employer in 2018.</p> <p>Employer: _____ 2018 Wages: \$ _____ <input type="checkbox"/> W-2 attached</p> <p>Employer: _____ 2018 Wages: \$ _____ <input type="checkbox"/> W-2 attached</p> | |
| C. I filed a 2018 Tax Return. | |
| <input type="checkbox"/> STUDENT | |
| <p>REQUIRED: You MUST attach proof that you filed a 2018 tax return by providing ONLY 1 of the 3 options below. Check the box that applies.</p> <p><input type="checkbox"/> I utilized the IRS DATA RETRIEVAL TOOL to transfer my 2018 income tax information from the IRS directly to my 2020-2021 FAFSA online.</p> <p><input type="checkbox"/> I attached my 2018 IRS TAX RETURN TRANSCRIPT.*</p> <p><input type="checkbox"/> I attached a SIGNED copy of my 2018 TAX RETURN with APPLICABLE SCHEDULES.</p> <p>*To request an IRS Tax Return Transcript, visit www.irs.gov → Get Tax Record → Get Transcript Online <u>OR</u> call 1-800-908-9946.</p> | |
| D. I filed a 2018 1040X Amended Tax Return to make changes to my initial 2018 tax return. | |
| <input type="checkbox"/> STUDENT | |

(REQUIRED documentation for statement D listed at the top of page 4)

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REQUIRED: You MUST attach proof of your original 2018 tax return AND your 2018 1040X AMENDED tax return. Check the box that applies.

- I attached **my 2018 IRS RECORD OF ACCOUNT TRANSCRIPT**, which includes information from the original tax return and the amended tax return.*
- I attached a **SIGNED copy of my 2018 TAX RETURN with APPLICABLE SCHEDULES AND a SIGNED copy of my 2018 1040X AMENDED TAX RETURN.**

*To request an **IRS Record of Account**, visit www.irs.gov → Get Tax Record → Get Transcript Online OR call 1-800-908-9946.

IV. UNTAXED INCOME: Check the gray box next to the applicable answer (NO or YES). If **YES**, you MUST attach REQUIRED documentation.

Did you or your parent file an IRA and/or pensions and annuities as ROLLOVER on your tax return?

| | |
|-----------|---------------------------------|
| NO | YES (see REQUIRED below) |
|-----------|---------------------------------|

REQUIRED: You and/or our parent MUST submit a copy of the **2018 TAX RETURN** with **APPLICABLE SCHEDULES**, which will notate **ROLLOVER** next to the applicable untaxed amount.

V. HOUSEHOLD VERIFICATION: To determine household size, include the applicable individuals:

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| YOURSELF |
| YOUR PARENT(S) |
| → If your biological/adoptive parent has re-married, you MUST include parent AND their spouse (step-parent). |
| → If your biological/adoptive parents are NOT currently married, but are living together, you MUST include BOTH parents. |
| PARENT'S OTHER CHILDREN – UNDER THE AGE OF 24 |
| → If a child will receive more than 50% of their support from parent(s) between July 1, 2020 and June 30, 2021, include them in the household – even if that child does not physically live with parent(s). |

| Name of household member | Relationship to student | Age | Enrolled in college at least ½ time | If enrolled, list the name and address of college. |
|----------------------------|-------------------------|-----------|-------------------------------------|--|
| <i>(Example): John Doe</i> | <i>Parent</i> | <i>54</i> | <i>No</i> | <i>N/A</i> |
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. | | | | |
| 6. | | | | |

If you need to list additional household members, provide a separate page with name and 900# listed at the top.