UNIVERSITY OF SOUTHERN MAINE

# 2024-2025 INDEPENDENT Verification Worksheet V- Federal Student Aid Programs

Your Free Application for Federal Student Aid (FAFSA) was selected by the U.S. Dept. of Education for a review process called "Verification". In this process, the Student Financial Services Office will be reviewing information from your application and collecting additional documentation. If there are differences between your application information and your financial documents, FAFSA corrections may need to be made. **We cannot process financial aid until verification has been completed. Please provide the required documents as soon as possible.**

**PLEASE SEE ATTACHED INSTRUCTIONS FOR ADDITIONAL DETAILS.**

## Section A: Student Information -- (V1, V4, V5)

Last Name First Name M.I. Student ID Number

Address (include apt. no.) Date of Birth

( )

City State Zip Code Preferred Phone Number

## Section B: Family Information -- (V1, V4, V5)

**Item 1: List the people in your household,** from July 1, 2024 through June 30, 2025. **Include:**

- Yourself;
- Your spouse if you are married;
- Your children or spouse's dependent children if they live with you and receive more than half of their support and will continue to receive more than half of their support from you (and/or your spouse) during the 2024-2025 year;
- Other people if they live with you and receive more than half of their support and will continue to receive more than half of their support from you (and/or your spouse) during the 2024-2025 year.

| Full Name | Age | Relationship |
|---|---|---|
| *Missy Jones (example)* | *18* | *Sister* |
| | | Self |
| | | |
| | | |
| | | |
| | | |
| | | |

To determine family size, the provided criteria for "dependent children" or "other persons" align whom the student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2024-2025 FAFSA.

Student's Name:_____ Student ID Number:_____

## Section C: Student's Income -- (V1, V5)

**Check the ONE box that applies:**

☐ I (and/or my spouse, if married) filed a 2022 federal income tax return and have consented for my *Federal Tax Information (FTI)* to be transferred to the FAFSA. **If 2022 income tax return information was not available or could not be used, I will provide a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

☐ I (and/or my spouse, if married) did not file and **was not required to file** a 2022 federal income tax return. For any income earned from work, **I have attached my (and/or my spouse, if married) 2022 W-2s from all employers and completed the box below.**

| Employer's Name | 2022 Amount Earned | W-2 Provided by Employer? |
|---|---|---|
| *Suzy's Auto Body Shop (example)* | *$2000.00* | *Yes* |
| | | |
| | | |

For other sources and amounts of earnings, other income, and resources that supported myself and/or my spouse for the 2022 tax year, **I have listed the source and amount below.**

| Other Income and Financial Resources | 2022 Amount |
|---|---|
| | |
| | |
| | |

**If your spouse did not file and was not required to file a 2022 United States federal income tax return with the IRS, please also have the statement below signed by your spouse.**

**I, _____, did not file and am not required to file a 2022 U.S. federal income tax return.**
**Spouse's Name**

_____ _____
**Spouse Signature** **Date**

## Section D: Certification and Signature – (V1, V4, V5)

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

_____ _____
**Student Signature** **Date**

*Return by mail to:*
**USM, Student Financial Services Office, 37 College Ave., Gorham, ME 04038 Phone: (207) 780-5250** or
https://usm.maine.edu/student-financial-services/university-of-southern-maine-financial-aid-secure-document-upload/

UNIVERSITY OF SOUTHERN MAINE

# 2024-2025 INDEPENDENT Verification Instructions
## Federal Student Aid Programs

**What you should do:**

1. Log in to MaineStreet and view which Verification Group is noted on your To Do list.
2. On the top right corner of the worksheet indicate which Verification Group is noted on your To Do list and complete ONLY the sections of this worksheet required for the Verification Group.
3. Contact us if you have questions about completing this worksheet at (207) 780-5250.
4. Please mail the completed and signed worksheet to the Student Financial Services Office.

   USM, Student Financial Services Office
   37 College Ave.
   Gorham, ME 04038

   or through our secure dropbox at https://usm.maine.edu/student-financial-services/university-of-southern-maine-financial-aid-secure-document-upload/

**For students (and your spouse, if married) who filed a 2022 Federal Tax Return:**

**Federal Tax Information (FTI)**. Check your MaineStreet "To Do" list for requested documentation. If tax documentation is requested, you can provide one of the following:

**A: Federal Tax Return.** Provide a **SIGNED** copy of the 2022 Federal Tax Return IRS Form 1040 (Pages 1 and 2) with Schedule 1 and Form 8863 (if filed). Clearly print your name and student ID number at the top of the page before submitting the document to USM.

**B: IRS Tax Return Transcript.** Go to www.IRS.gov, select "Get Your Tax Record" link, or call 1-800-908-9946 to request a 2022 IRS Tax Return Transcript. Make sure to request the 2022 IRS Tax "Return" Transcript (NOT the IRS Tax "Account" Transcript). Clearly print your name and student ID number at the top of the page before submitting the document to USM.

***Important Notes:***

- If you or your spouse filed, or will file, an amended 2022 federal tax return, have been the victim of IRS identity theft in 2022, filed a foreign tax return, or have been granted an extension beyond the automatic six-month extension for tax year 2022, you must contact the Student Financial Services Office for specific instructions.
- If you had a change in marital status after December 31, 2022, please contact the Student Financial Services Office.

**For Independent Students who did not file a 2022 federal tax return:**

- If you (and your spouse if married) earned income in 2022, in section C list every employer and the amounts earned in 2022, even if the employer did not issue you a 2022 W-2. You must attach a copy of the W-2 for each employer that was required to provide a W-2. If you no longer have the W-2, request a copy from the employer. If more space is needed, attach a separate page with the student's name and ID number at the top.