UNIVERSITY OF SOUTHERN MAINE

2022-2023 DEPENDENT 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. The law says we have the right to ask you for this information before awarding Federal Student Aid. If there are differences between your application information and your financial documents, FAFSA corrections may need to be made. **We cannot process your 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 parent(s)' household, from July 1, 2022 through June 30, 2023. **Include:**

- Yourself;
- Your parent(s), including stepparent, (as listed on your FAFSA) even if you don't live with your parent(s);
- Your parent(s)' other children, even if they don't live with your parent(s), if (a) your parent(s) will provide more than half of their support, or (b) the children would be required to provide parental information when applying for Federal Student Aid;
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support.

Item 2: For any household member listed below who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible post-secondary educational institution any time between July 1, 2022 and June 30, 2023, *excluding the parents*, include the name of the college. *If more space is needed, attach a separate page with your name and Student ID Number at the top.*

Full Name	Age	Relationship	College	Will be enrolled at least Half Time (Yes or No)
Missy Jones (example)	*18*	*Sister*	*Central University*	*Yes*
		Self	University of Southern Maine	

Student's Name:_____ Student ID Number:_____

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

Check the ONE box that applies:

☐ I filed a 2020 federal income tax return and have used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2020 IRS income information into my FAFSA **or** I will submit my 2020 IRS federal tax return transcript **or** a SIGNED copy of my 2020 federal tax return IRS Form 1040 (Pages 1 and 2) with Schedules 1, 2 and 3 (if filed). (See attached instructions for details).

☐ I have not filed and I am not required to file a 2020 federal income tax return and I had no income earned from work in 2020.

☐ I was employed in 2020 and I did not file and was not required to file a 2020 federal income tax return. **I have attached my 2020 W-2s from all employers and completed the box below.**

Employer's Name	2020 Amount Earned	W-2 Provided by Employer?
Suzy's Auto Body Shop (example)	*$2000.00*	*Yes*

Section D: Parent's Income - (V1, V5)

Check the ONE box that applies:

☐ My parent(s) have filed a 2020 federal income tax return and have used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2020 IRS income information into my FAFSA **or** I will submit my parent(s)' 2020 federal IRS tax return transcript(s) **or** a SIGNED copy of my parent(s)' 2020 federal tax return IRS Form 1040 (Pages 1 and 2) with Schedules 1, 2 and 3 (if filed). (See attached instructions for details).

☐ My parent(s) have not filed and are not required to file a 2020 federal income tax return and had no income earned from work in 2020. **I have attached my parent(s)' 2020 IRS Verification of Nonfiling Letter.** (See attached instructions for details).

☐ My parent(s) were employed in 2020 and did not and are not required to file a 2020 federal income tax return. **I have attached my parent(s)' 2020 IRS Verification of Nonfiling Letter(s), 2020 W-2s from each employer and completed the box below.** (See attached instructions for details).

Employer's Name	2020 Amount Earned	W-2 Provided by Employer?
Suzy's Auto Body Shop (example)	*$2000.00*	*Yes*

Section E: Certification and Signatures – (V1, V4, V5)

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

_____ _____

Student Signature **Date**

_____ _____

Parent Signature **Date**

Return by mail to: **USM Student Financial Services Office, 37 College Ave., Gorham, ME 04038 Phone: (207) 780-5250**

UNIVERSITY OF SOUTHERN MAINE

2022-2023 DEPENDENT 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 the 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 Avenue, Gorham ME 04038

For students and/or parents who filed a 2020 Federal Tax Return, there are three options:

Please note: some students whose parental income is $27,000 or less may not be required to report student income on the FAFSA and will not need to complete Student IRS Data Retrieval. Please contact the USM Student Financial Services Office with any questions.

A: IRS Data Retrieval Tool. Log in at www.FAFSA.gov using your FSA ID. Select "Make FAFSA Corrections," and navigate to the Financial Information section of the FAFSA. Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2020 IRS income tax information into your FAFSA. Re-sign and re-submit the FAFSA to send the IRS Data Retrieval information to USM.

B: Federal Tax Return. Provide a **SIGNED** copy of the 2020 Federal Tax Return IRS Form 1040 (Pages 1 and 2) with Schedules 1, 2 and 3 (if filed). Clearly print your name and student ID number at the top of the page before submitting the document to USM.

C: IRS Tax Return Transcript. Go to www.IRS.gov, select "Get Your Tax Record" link, or call 1-800-908-9946 to request a 2020 IRS Tax Return Transcript. Make sure to request the 2020 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 parent(s) filed, or will file, an amended 2020 IRS tax return, or have been the victim of IRS identity theft in 2020, or filed a foreign tax return, you must contact the Student Financial Services Office for specific instructions.
- If two parents were reported in Section B of the verification worksheet, the instructions refer and apply to both parents. If the parents filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020, please contact the Student Financial Services Office.

For students and/or parents who did not and were not required to file a 2020 Federal Tax Return:

Dependent students who did not file a 2020 federal tax return and had earned income from work:

In section C list every employer and the amounts earned in 2020, even if the employer did not issue you a 2020 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.

Parents of dependent students who did not file a 2020 federal tax return:

- Parents must obtain a Verification of Nonfiling letter from the IRS. To obtain a Verification of Nonfiling Letter from the IRS, go to www.IRS.gov, click on "Forms and Instructions" and print the Form 4506-T. Complete sections 1-4, check off Box 7, enter the date 12/31/2020 in Box 9, and be sure to sign and date the form. Mail the Form 4506-T to the appropriate IRS office indicated on page 2 of the form. Once you receive the document from the IRS, clearly print your name and student ID number at the top of the page before submitting the document to USM.
- If parents earned income in 2020, in section D list every employer and the amounts earned in 2020, even if the employer did not issue you a 2020 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.