



Multnomah University Office of Financial Aid

VERIFICATION WORKSHEET (DEPENDENT)

2020 - 2021 Academic Year

**MULTNOMAH
UNIVERSITY**

STEP 1 – STUDENT INFORMATION

| | | |
|---------------|------|------------------------|
| First | Last | Social Security Number |
| Email Address | | Cell Phone |

STEP 2 – STUDENT AND FAMILY/HOUSEHOLD INFORMATION

List the people in your household, including yourself. Indicate those who will be attending college at least half time between July 1, 2020 and June 30, 2021, and will be enrolled in a degree, diploma, or certification program.

Who to include in your household:

- **Yourself and your custodial parent(s)** (including step-parent(s) even if you don't live with your parent(s))
- **Your parents' other dependent children**, even if they don't live with your parent(s), if a) your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021, or b) the children would be required to provide parental information when applying for Federal Student Aid
- **Other people** only if they now live in your parents' household and your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021

| Full Name | Age | Relationship | Attending College In 2020/2021? | Name of College Attending |
|-----------|-----|--------------|---------------------------------|---------------------------|
| | | SELF | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

*List additional people on the back of this sheet, if applicable

STEP 3 – 2018 STUDENT INCOME AND TAX INFORMATION

Tax filers: Complete this section if you (the student) filed or will file a 2018 tax return. If you did not file taxes in 2018 DO NOT complete this section but proceed to the *Non-tax filers* section below.

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of the FAFSA. In most cases, no further documentation is needed to verify income information that was transferred to the FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- I **have used** the IRS Data Retrieval Tool (DRT) in my 2020-2021 FAFSA to transfer my 2018 IRS income tax return information into my FAFSA.
- I **will use** the IRS Data Retrieval Tool (DRT) by logging into my 2020-2021 FAFSA to import my 2018 IRS income tax return information into my FAFSA.
- I **am unable or choose not to use** the Data Retrieval Tool (DRT) to import my 2018 tax information into my FAFSA and instead will provide the school with a 2018 IRS Tax Return Transcript.

A 2018 IRS Tax Return Transcript may be obtained through:

- Get Transcript by MAIL: Go to www.irs.gov/individuals/get-transcript, click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript ONLINE: Go to www.irs.gov/individuals/get-transcript, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- If you are unable to obtain your Tax Return Transcript online or via mail, contact the Financial Aid Office for further instructions.
 - Check here if a 2018 IRS Tax Return Transcript is provided.
 - Check here if a 2018 IRS Tax Return Transcript will be provided later.

Non-tax filers: Complete this section if you did not file taxes for 2018 and were not required to do so.

Check the box that applies:

- I was not employed and had no income earned from work in 2018.
- I was employed and had some income earned from work in 2018 but was not required to file a 2018 IRS tax return. I have listed the names below of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 or an equivalent document was provided (*provide copies of all 2018 IRS W-2s issued to you by your employers*).

| Employer's Name | IRS W-2 or Equivalent Provided? | Annual Amount Earned in 2018 |
|---|---------------------------------|------------------------------|
| | | \$ |
| | | \$ |
| | | \$ |
| <i>Total Income Earned from Work for 2018</i> | | \$ |

**If more space is needed, provide a separate page with the student's name and ID number at the top.*

STEP 4 –2018 PARENT INCOME AND TAX INFORMATION

Tax filers: Complete this section if your parents filed or will file a 2018 tax return. If your parents did not file taxes in 2018 DO NOT complete this section but proceed to the *Non-tax filers* section below.

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of FAFSA. In most cases, no further documentation is needed to verify income information that was transferred to the FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- I/we **have used** the IRS Data Retrieval Tool (DRT) in the 2020-2021 FAFSA to transfer their 2018 IRS income tax return information into the student's FAFSA.
- I/we **will use** the IRS Data Retrieval Tool (DRT) by logging into the 2020-2021 FAFSA to import their 2018 IRS income tax return information into the student's FAFSA.
- I/we are **unable or choose not to use** the Data Retrieval Tool (DRT) to import their 2018 tax information into the FAFSA, and instead will provide the school with a 2018 IRS Tax Return Transcript.

See STEP 3, Tax Filers section above for instructions on obtaining a 2018 IRS Tax Return Transcript.

If the parents filed separate 2018 IRS income tax returns, the IRS DRT cannot be used, and the 2018 IRS Tax Return Transcript(s) must be provided for each.

- Check here if 2018 IRS Tax Return Transcripts are provided.
- Check here if 2018 IRS Tax Return Transcripts will be provided later.

Non-tax filers: Complete this section if your parents did not file taxes for 2018 and were not required to do so.

Part 1.

Provide documentation from the IRS, or other relevant tax authority, dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS.

A Verification of Nonfiling letter may be obtained from the IRS by submitting IRS Form 4506-T and checking box 7.

- Check here if a 2018 IRS Verification of Nonfiling letter is provided.
- Check here if a 2018 IRS Verification of Nonfiling letter will be provided later.

Part 2.

Check the box that applies:

- Neither parent was employed, and neither had income earned from work in 2018. If you selected this option, you must complete the Multnomah Office of Financial Aid Proof of Support Worksheet.**
 - Check here if the Proof of Support Worksheet is included.
 - Check here if the Proof of Support Worksheet will be provided later.
- One or both parents were employed in 2018 and had some income earned from work in 2018, but were not required to file a 2018 IRS tax return, and have listed below the names of all employers, and the amount earned from each employer in 2018, and whether an IRS W-2 or an equivalent document is provided (provide copies of all 2018 IRS W-2s issued).**

| Employer's Name | IRS W-2 or Equivalent Provided? | Annual Amount Earned in 2018 |
|---|---------------------------------|------------------------------|
| | | \$ |
| | | \$ |
| | | \$ |
| <i>Total Income Earned from Work for 2018</i> | | \$ |

**If more space is needed, provide a separate page with the student's name and ID number at the top.*

STEP 5 – CERTIFICATION AND SIGNATURES

By signing this worksheet, I certify that all the information reported is complete and correct.

Signature of Student

Date

Signature of Parent

Date

Please return to the Multnomah University Office of Financial Aid. Do not mail this worksheet to the U.S. Department of Education.