| Monmouth COLLEGE | **2021-2022 Dependent Student Verification Worksheet**<br>Your FAFSA application was flagged by the U.S. Department of Education or by the institution for a review process known as "Verification". As part of this process, we are required to verify the information you provided on the Free Application for Federal Student Aid (FAFSA) before disbursing financial assistance. Corrections to your FAFSA may be made once verification items are submitted and reviewed by our staff. | **Level #6** |
|---|---|---|

You are asked to provide the requested information within **three weeks** of our request (but no later than one month prior to your planned enrollment) to allow us time to provide you with complete and accurate information about your eligibility for financial assistance. Failure to provide this information will prevent us from disbursing financial assistance to you and may result in you not being allowed to enroll if you have not secured the funding necessary to cover your out-of-pocket costs. The sooner you provide us with this information, the longer we have to plan appropriately for your attendance at Monmouth College.

## A. Student Contact Information:

Last Name: _____ First Name: _____ M.I.:_____ SS#: _____-_____-_____

Permanent Street Address: _____ Apt#_____ Birth date: _____

City: _____ State: _____ Zip: _____ Home Phone: _____

Preferred Email: _____ Cell Phone: _____

I live with my: (check all that apply)

☐ Father ☐ Mother ☐ Step-parent ☐ Guardian(s) ☐ Other: _____

## B. Parent's Contact Information:

| ☐ **Parent #1 Information** ☐ **Step-Parent's Information** | ☐ **Parent #2 Information** ☐ **Step-Parent's Information** |
|---|---|
| Full Legal Name: | Full Legal Name: |
| Street Address: | Street Address |
| City, State, Zip: | City, State, Zip: |
| Cell Ph#: Home Ph#: | Cell Ph#: Home Ph#: |
| Employer: | Employer: |
| Position/Title: | Position/Title: |
| Work Ph#: | Work Ph#: |
| Preferred Email: | Preferred Email: |

## C. Household Information: List below the people in the parent(s) household. Include:

- Yourself (the student), even if you don't live with your parents.
- Your parent(s). In cases of divorce, use the parent you lived with more in the past 12 months, including their spouse/your step-parent if applicable.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2021 through June 30, 2022, or if the other children would be required to provide parental information if they were completing a FAFSA for 2021 – 2022. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents ***and*** the parents provide more than half of the support and will continue to support through June 30, 2022.

**Number in college**: Include in the space below information about any household member who is or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2021 and June 30, 2022, and include the name of the college.

| Full Legal Name | Relationship to you (Parent/Sibling) | Age | If Enrolled at **least half time** from July 2021 – June 2022 list name of College below | Year in college during 2021-2022 (Fr/So/Jr/Sr) |
|---|---|---|---|---|
| 1. | **Yourself** | | **Monmouth College** | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. | | | | |
| 6. | | | | |
| 7. | | | | |
| 8. | | | | |

If you have more than 8 members in your household, please attach an additional page outlining additional members of the household.

**D. Student Tax Transcripts and Income Information:**

**If the student *has* filed an IRS 2019 Federal Tax Return, proceed to Box 1.**
**If the student *has not* filed an IRS 2019 Federal Tax Return, proceed to Box 2.**

### Box 1 for Student Tax Filers

**Important Note**: The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) which is part of the FAFSA on the Web at FAFSA.gov. This allows you to transfer your tax information from the IRS directly to your FAFSA electronically.

☐ The student *has already used* the IRS DRT in the FAFSA on the Web to transfer 2019 IRS income tax return information into the student's FAFSA on _____.

☐ The student *has not yet used* the IRS DRT in the FAFSA on the Web, but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA by _____ (date).

☐ The student is unable or chooses not to use the IRS DRT in the FAFSA on the Web, and instead will provide the school with a **2019 IRS Tax Return Transcript from the Internal Revenue Service (IRS) online at www.irs.gov or by phoning the IRS (1-800-908-9946)**.

☐ The student has provided a copy of their 2019 Federal Income Tax Return that was filed with the IRS, including all W-2's, schedules and forms.

### Box 2 for Student Non-Tax Filers

☐ The student was not employed, had no income earned from work in 2019, and has indicated this on the FAFSA.

☐ The student was employed in 2019 and has listed below the names of all employers and the amount earned from each employer in 2019.
**Provide copies of all 2019 IRS W-2 forms issued to the student by his/her employers**.
If a W-2 is not available, or the student did not save a copy of your IRS Form W-2, the student should request a replacement W-2 from the employer who issued the original. A W-2 transcript from the IRS is also acceptable. If the student is unable to obtain one in a timely manner, he/she may provide a signed statement that includes the amount of income earned from work, the source of that income, and the reason why the W-2 is not available in a timely manner.

List every employer even if the employer did not issue an IRS W-2 form.

| Employer Name | Was a W-2 provided? | Amount |
|---|---|---|
| | | |
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**This is a requirement of the Federal Department of Education.**

## E. Parent Tax Transcripts and Income Information:

**If the parent(s) *has* filed an IRS 2019 Federal Tax Return, proceed to Box 1.**
**If the parent(s) *has not* filed an IRS 2019 Federal Tax Return, proceed to Box 2.**

### Box 1 for Parent Tax Filers

**Important Note**: The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) which is part of the FAFSA on the Web at FAFSA.gov. This allows you to transfer your tax information from the IRS directly to your FAFSA electronically.

☐ The parents *have already used* the IRS DRT in the FAFSA on the Web to transfer 2019 IRS income tax return information into the student's FAFSA on _____.

☐ The parents *have not yet used* the IRS DRT in the FAFSA on the Web, but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA by _____ (date).

☐ The parent is *unable or chooses not to use* the IRS DRT in the FAFSA on the Web, and instead will provide the school with a **2019 IRS Tax Return Transcript from the Internal Revenue Service (IRS) online at www.irs.gov or by phoning the IRS (1-800-908-9946)**.

If parents are married and they filed separate 2019 IRS income tax returns, the IRS DRT cannot be used and a paper **IRS Tax Return Transcript** must be provided for each**.**

___ Check here if both **2019 IRS Tax Return Transcripts** are enclosed.
___ Check here if both **2019 IRS Tax Return Transcripts** will be provided by _____ (date)**.**

☐ The Parents have provided a signed copy of their 2019 Federal Income Tax Return that was filed with the IRS, including all W-2's, schedules and forms.

### Box 2 for Parent Non-Tax Filers

**Whether you worked in 2019 or not, if you *did not* file a 2019 federal income tax return, you must provide a verification of non-filer from the IRS. You can obtain the verification of non-filer by going to www.irs.gov , complete the IRS form 4506-T and submit it, or by phoning the IRS (1-800-908-9946). The verification of non-filer will be sent to you and you will then need to provide a copy with this verification form. This is a requirement of the Federal Department of Education.**

☐ The parents were not employed and had no income earned from work in 2019.

☐ The parents were employed in 2019 and have listed below the names of all employers and the amount earned from each employer in 2019.

**Provide copies of all 2019 IRS W-2 forms issued to the parents by his/her employers**.

If a W-2 is not available, or the parents did not save a copy of your IRS Form W-2, the parent should request a replacement W-2 from the employer who issued the original. A W-2 transcript from the IRS is also acceptable. If the parent is unable to obtain one in a timely manner, he/she may provide a signed statement that includes the amount of income earned from work, the source of that income, and the reason why the W-2 is not available in a timely manner.

List every employer even if the employer did not issue an IRS W-2 form.

| Employer Name | Was a W-2 provided? | Amount |
|---|---|---|
| | | |
| | | |
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## F. Other Untaxed Income in 2019 not viewable on a federal tax return:

Please do not leave any question blank. If the answer does not apply, indicate by putting a $0 or N/A.

- ☐ Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and that is not parent of a legal child support agreement. Student $_____Parent $_____
- ☐ Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits.) Don't include the value of on-base military housing or the value of a basic military allowance for housing. Student $_____Parent $_____
- ☐ Veterans non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances. Student $_____Parent $_____
- ☐ Other untaxed income not reported on the FAFSA, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1 – line 12. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment ACT educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. Student $_____Parent $_____
- ☐ Payments to tax-deferred pension and retirement savings plans paid directly or withheld from earnings, including but not limited to amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Student $_____Parent $_____

**G. Explanation of Financial Support:** If you have indicated you are not required to file a tax return in Item D and Item E above, and if you have little or no sources of income listed in Item F above, then you are required to explain how the family was financially supported during the 2019 calendar year.

Please do not leave any question blank. If the answer does not apply, indicate by putting a $0 or N/A.

- ☐ Members of my household receive Child Support payments in the amount of: _____ per month.
- ☐ Members of my household receive Supplemental Nutrition Assistance Program (SNAP) in the amount of: _____ per month.
- ☐ Members of my household receive free or reduced price school lunch payments in the amount of: _____ per month.
- ☐ Members of my household receive Temporary Assistance for Needy Families (TANF) payments in the amount of: _____ per month.
- ☐ Members of my household receive Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) payments in the amount of: _____ per month.
- ☐ Members of my household receive untaxed Social Security benefits in the amount of: _____ per month.
- ☐ Members of my household receive Supplemental Security Income in the amount of: _____per month.
- ☐ Members of my household receive foster care or adoption payments in the amount of: _____per month.
- ☐ Other: Explain here if there is any other income in the household, including extended family members or friends that are helping support the family._____

_____

_____

_____

**H. Required Signatures:**

Each person(s) signing below certify that all the information reported on this worksheet is complete and correct.

| Student's Signature | Date | Parent's Signature | Date |
|---|---|---|---|

Complete, sign and return this worksheet. ***Do not leave sections of this form blank****. Incomplete forms will be returned to you.*

Return Form by postal mail to: Monmouth College, Office of Student Financial Planning, 700 East Broadway, Monmouth, IL 61462

Or you may FAX to: 309-457-2373 Or you may scan and email to: finaid@monmouthcollege.edu