

# I VERIFICATION INDEPENDENT STUDENT Academic year 2018-2019

## DIRECTIONS

**PLEASE read instructions carefully, complete both pages, and sign this form on page 2.** Your financial aid application was selected for review in a process called “verification.” We can resume processing your application when this form and all required documentation have been submitted. To be considered for financial aid the documentation must be submitted by your last date of eligible enrollment, or the date listed below that corresponds with your last term of enrollment, whichever is first:

- **Fall term 2018:** December 3, 2018
- **Spring term 2019:** April 26, 2019
- **May/summer 2019:** July 12, 2019

In the verification process we compare the information you provide on this form and your 2016 tax return transcripts to the information provided on your Free Application for Federal Student Aid (FAFSA). If the information on your FAFSA differs from the information on your financial documents, your application data will be corrected. Your financial aid award amounts will reflect those changes. **Please be sure to write your (the student’s) name and either University ID number or last four digits of SSN on all tax documents submitted.**

To ensure privacy online, open in Adobe Reader (free at Adobe.com). Please add the required signature(s) in blue or black ink.

**RETURN FORM:**

**BY MAIL TO:**

**Office of Student Finance**  
200 Fraser Hall  
106 Pleasant St. SE  
Minneapolis, MN 55455-0422

**IN PERSON ON CAMPUS TO:**

**One Stop Student Services**  
333 Robert H. Bruininks Hall  
130 West Bank Skyway  
130 Coffey Hall

**Questions?**

Phone: 612-624-1111  
TTY (hearing impaired): 612-626-0701  
Email: onestop@umn.edu

STEP 1. Student information			
Name (last, first, middle initial)	Birth date (mm/dd/yyyy)	Last 4 digits of Social Security number	University student ID

**STEP 2. Student household information**

**PLEASE READ AND COMPLETE THIS SECTION CAREFULLY**

A. List members in your household. Provide names, birth dates and relationships of all eligible household members for whom you (and/or your spouse) will provide more than 50% of financial support between July 1, 2018 and June 30, 2019. List only those family members who live in the same household with you, and if you are married, your spouse. Eligible household members include the following:

- Yourself (and your spouse if you are married),
- Your children, if you will provide **more than half their financial support** and you will continue to provide more than half their support from July 1, 2018 through June 30, 2019.
- Other people if they **NOW** live with you, receive **more than half their financial support** and will continue to receive more than half their support from you from July 1, 2018 through June 30, 2019.

B. If anyone listed is **or will be enrolled in a degree or certificate program at least half time** between July 1, 2018 and June 30, 2019, list the postsecondary institution they will attend. You may be required at a later date to provide confirmation of enrollment for all household members attending college at least half time.

C. For family members enrolled at least half time in a postsecondary institution, report the program level in which they are enrolled—**PSEOP** (Postsecondary Enrollment Options Program, i.e. college attendance prior to high school graduation), **undergraduate**, or **graduate**.

Members in household				
Name	Birth date (mm/dd/yyyy)	Relationship to student	Postsecondary institution they will attend at least half time from July 1, 2018 to June 30, 2019	Program level (PSEOP, undergraduate, or graduate)
1.		self	University of Minnesota, Twin Cities	
2.		spouse		
3.				
4.				
5.				

**More than five household members? YOU ARE REQUIRED TO ATTACH A LIST** of the additional household members. Your list must provide all of the information requested above for each additional person listed. Your aid may increase with this information.

To request copies of this form in an alternative format, call Disability Resource Center at 612-626-1333. The University of Minnesota is an equal opportunity employer and educator. This form is printed on paper made from no less than 20 percent post-consumer waste.



Please recycle.

## STEP 3. U.S. or foreign income

Read the options below and select which option applies. **If married, indicate one option for the student AND one option for the spouse.** Then, submit the required documentation for the option each of you selected.

Tax filing status		Action required															
Option 1: Filed 2016 tax return and will transfer or already transferred tax data to FAFSA		Submit your IRS tax return data to your FAFSA by using the IRS Data Retrieval Tool (DRT) online. If you have already transferred your tax return data to your FAFSA, no further documentation is required for this option. <ul style="list-style-type: none"> <li>To use the IRS Data Retrieval Tool (DRT), log onto your FAFSA at <a href="http://fafsa.gov">fafsa.gov</a>. If you are not eligible to use the DRT, you must submit your tax return data via paper transcript (option 2 of this form).</li> <li>Using the DRT, you must sign the FAFSA with your FSA ID and click "Submit" to successfully transfer your tax data to the FAFSA. If successfully transferred, we will receive your data within a few days.</li> </ul>															
Student <input type="checkbox"/>	Spouse <input type="checkbox"/>																
Option 2: Filed a 2016 tax return and will submit tax return		Do one of the following: <ol style="list-style-type: none"> <li>Submit a <b>signed</b> copy of your 2016 federal tax return, OR</li> <li>Submit an "IRS Tax Return Transcript" (<b>not</b> a "Tax Account Transcript") for your 2016 federal tax return.</li> </ol> <ul style="list-style-type: none"> <li>Request a tax return transcript online or by mail: <a href="http://www.irs.gov/individuals/get-transcript">www.irs.gov/individuals/get-transcript</a> <ul style="list-style-type: none"> <li>Have available: 1) your SSN, date of birth, filing status, and mailing address from your latest tax return, and, 2) access to your email account, a cell phone account in your name, and a financial account such as a credit card, mortgage, etc.</li> <li>The data you enter must be exactly the same as it appears on your federal tax return.</li> </ul> </li> <li>Request a tax return transcript by phone: 1-800-908-9946.</li> <li>Request a tax return transcript via IRS Form 4506-T: <a href="http://www.irs.gov/forms-instructions">www.irs.gov/forms-instructions</a> <ul style="list-style-type: none"> <li>Make sure to select box 6a. This form must be signed by the tax filer.</li> <li>Use the US Postal Service format for your address (<a href="http://usps.com">usps.com</a>).</li> <li>Mail the form to the IRS at the address provided.</li> </ul> </li> </ul>															
Student <input type="checkbox"/>	Spouse <input type="checkbox"/>																
Option 3: Worked, but not required to file tax return		(1) Submit copies of your <b>2016 W-2</b> forms, (2) submit a Verification of Non-filing (VONF) letter, and (3) list employers and income in the table below (required). <ul style="list-style-type: none"> <li>To obtain a VONF online, go to <a href="http://www.irs.gov/individuals/get-transcript">www.irs.gov/individuals/get-transcript</a>.               <ul style="list-style-type: none"> <li>Click "Get Transcript Online." Once it is determined that you did not file, you will be presented with a page indicating that the IRS has no record of a tax return being filed for the requested year. Print this page, make a copy for your records, and send it with this form.</li> </ul> </li> <li>To obtain a VONF via IRS form 4506-T, go to <a href="http://www.irs.gov/forms-instructions">www.irs.gov/forms-instructions</a>.               <ul style="list-style-type: none"> <li>Make sure to check box 7. This form must be signed by the tax filer.</li> <li>Use the US Postal Service format for your address (<a href="http://usps.com">usps.com</a>).</li> <li>Mail the form to the IRS at the address provided.</li> </ul> </li> </ul>															
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<table border="1"> <thead> <tr> <th colspan="3">Employers and income for 2016 (required for student and/or spouse if you worked but did not file)</th> </tr> <tr> <th>Name of employer or source of income</th> <th>2016 student income amount</th> <th>2016 spouse income amount</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>			Employers and income for 2016 (required for student and/or spouse if you worked but did not file)			Name of employer or source of income	2016 student income amount	2016 spouse income amount									
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Option 4: Did not work		Submit a Verification of Non-filing (VONF) letter. <ul style="list-style-type: none"> <li>To obtain a VONF online, go to <a href="http://www.irs.gov/individuals/get-transcript">www.irs.gov/individuals/get-transcript</a>.               <ul style="list-style-type: none"> <li>Click "Get Transcript Online." Once it is determined that you did not file, you will be presented with a page indicating that the IRS has no record of a tax return being filed for the requested year. Print this page, make a copy for your records, and send it with this form.</li> </ul> </li> <li>To obtain a VONF via IRS form 4506-T, go to <a href="http://www.irs.gov/forms-instructions">www.irs.gov/forms-instructions</a>.               <ul style="list-style-type: none"> <li>Make sure to check box 7. This form must be signed by the tax filer.</li> <li>Use the US Postal Service format for your address (<a href="http://usps.com">usps.com</a>).</li> <li>Mail the form to the IRS at the address provided.</li> </ul> </li> </ul> <p>If you attempted but were not able to obtain a VONF, call One Stop Student Services at 612-624-1111.</p>															
Student <input type="checkbox"/>	Spouse <input type="checkbox"/>																

## STEP 4. Certification

**You are required to sign and date this certification section.** Signatures must be hand-signed in blue or black ink. By signing this form, I/we certify that all the information we have reported on this form to qualify for federal student aid is complete and correct.

Student signature (required)	Phone number	Date signed
Spouse signature	Phone number	Date signed