

Milwaukee School of Engineering 2020-2021 Independent Verification Worksheet

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for a review process called "Verification." MSOE is required by the Department of Education to review the requested information under 34 CFR, Part 668.

Please submit all required documentation by our priority deadline of July 1st, 2020, or if after, within 15 business days of notification from MSOE.

If you use the IRS Data Retrieval Tool and/or submit FAFSA corrections to retrieve income or tax data, please note that it can take up to a week for MSOE to receive the updated FAFSA. Your financial aid will not be determined and/or disbursed until all verification requirements are completed.

To retrieve tax or income information, you can use the "Get Transcript" tool on www.irs.gov, call 1-800-908-9946, or fill out IRS Form 4506-T and return directly to the IRS via fax or mail. This can also be utilized for a 2018 Verification of Non-Filing Letter if you have not filed taxes.

What to do:

1. Complete steps 1 – 5 and sign the Verification Worksheet. **Read all instructions as errors can delay processing of your financial aid.**
2. Submit required documents to the Financial Aid Office via fax (414-277-6952), in person (CC431), or mailed to our attention. Be aware that MSOE may ask for additional information or forms. Please send all necessary information in a timely manner to continue the process.
3. Upon receipt of all documents, MSOE will review and submit corrections to the Department of Education, if necessary.

1. Student Information

Name: _____ MSOE ID Number: _____

Address: _____ Date of Birth: _____

City, State Zip: _____ Phone Number: _____

2. Family Information

According to information provided on the FAFSA, you are classified as an **Independent Student**. Please note that dependency status for the FAFSA and for taxes are different. Please include in the table below information about all members of your household.

Household members include:

- The student
- The student's spouse, if the student is married
- The student's or spouse's children, if the student or spouse will provide more than half of the children's support from July 1, 2020, through June 30, 2021, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2021.

Number in College: Also 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, 2020, and June 30, 2021, and include the name of the college.

Write the name, age, and relationship (to you, the student) of all household members. Please do not omit age, relationship or name information, as we will require it to be resubmitted if incomplete. If you require additional space, you may include another page.

Full Name	Age	Relationship	College
		Self	Milwaukee School of Engineering

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

3. Student 2018 Income Information

I, the student, did file a 2018 IRS Income Tax Return(s) and...

- I used the IRS Data Retrieval Tool that is part of the FAFSA at FAFSA.gov
- I did not use the IRS Data Retrieval Tool and will provide a signed copy of my 2018 Signed 1040 Tax Return
- Filed taxes as “married filing separately”, and we are attaching signed copies of both tax returns
- Amended the 2018 IRS Income Tax Return(s) and will provide a signed copy of the 2018 IRS Form 1040x as well as a 2018 Signed 1040 Tax Return

OR

I, the student, did not file a 2018 IRS Income Tax Return.

If you were not required to file a return but worked in 2018, list all employers and amounts earned below. Please note that if IRS law requires you to file a federal tax return, we cannot take further action on your application for federal student aid until you furnish us a signed copy of your tax return. You must ALSO submit a 2018 Confirmation of Non-filing dated after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.

Complete the following table only if you are a non-tax filer.

In the table below list the names of the employers, the amount earned from each employer in 2018, and whether an IRS W-2 was provided. List every employer even if they did not issue an IRS W-2. If more space is needed, provide an additional page with the student’s name and ID# at the top. *Please submit copies of each of the W2s listed.*

Employer Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2018
<i>Example: ABC Auto Shop</i>	<i>Yes</i>	<i>\$3,100</i>
		\$
		\$
		\$
Total Amount of Income Earned from Work		\$

4. Spouse 2018 Income Information

I, the spouse, did file a 2018 IRS Income Tax Return(s) and...

- Used the IRS Data Retrieval Tool that is part of the FAFSA at FAFSA.gov
- Did not use the IRS Data Retrieval Tool and will provide a signed copy of my 2018 Signed 1040 Tax Return or I filed taxes as “married filing separately”, and we are attaching signed copies of both tax returns
- Amended the 2018 IRS Income Tax Return(s) and will provide a signed copy of the 2018 IRS Form 1040x as well as a 2018 Signed 1040 Tax Return

OR

I, the spouse, did not file a 2018 IRS Income Tax Return.

If you were not required to file a return but worked in 2018, list all employers and amounts earned below. Please note that if IRS law requires you to file a federal tax return, we cannot take further action on your application for federal student aid until you furnish us a signed copy of your tax return. You must ALSO submit a 2018 Confirmation of Non-filing dated after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.

Complete the following table only if you are a non-tax filer.

In the table below list the names of the employers, the amount earned from each employer in 2018, and whether an IRS W-2 was provided. List every employer even if they did not issue an IRS W-2. If more space is needed, provide an additional page with the student’s name and ID# at the top. *Please submit copies of each of the W2s listed.*

Employer Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2018
<i>Example: ABC Auto Shop</i>	<i>Yes</i>	<i>\$3,100</i>
		\$
		\$
		\$
Total Amount of Income Earned from Work		\$

5. Certification & Signature

BEFORE YOU SUBMIT THIS WORKSHEET:

- | | |
|--|--|
| <input type="checkbox"/> Have you completed the family information section of this form? | <input type="checkbox"/> Have you included all required documentation? |
| <input type="checkbox"/> Have you answered the above income questions? | <input type="checkbox"/> Have you signed the worksheet? |

By signing this worksheet, I (we) certify that all the information reported to qualify for federal student aid is complete and correct.

PLEASE NOTE: MSOE will not accept typed signatures, signatures that are completed using PDF editor, or signatures that are written in pencil.

Student’s Signature: _____ Date: _____
 Spouse’s Signature: _____ Date: _____