



Milwaukee School of Engineering 2022-2023 Independent Verification Worksheet

Your 2022-2023 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 documents by our priority deadline of July 1st, 2022, or if after, within 15 business days of notification.

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 corrected 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 or fill out IRS Form 4506-T and return directly to the IRS via fax or mail. This can also be utilized for a 2020 Verification of Non-Filing Letter if you are not required to file taxes.

What to do:

1. Complete all sections and sign this 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), mailed to our attention, or submitted to our secure document upload at msoe.edu/finaid. 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

Student's 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, 2022, through June 30, 2023, even if a child does not live with the student.
- Other people if they 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, 2023.

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, 2022, and June 30, 2023, 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 2020 Income Information

- I, the student, did file a 2020 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 copy of 2020 Tax Return Transcript or my 2020 Signed 1040 Tax Return with Schedules 1, 2, and/or 3, if applicable
 - Filed taxes as “married filing separately”, and will provide signed copies of both tax returns
 - Amended the 2020 IRS Income Tax Return(s) and will provide a signed copy of the 2020 IRS Form 1040x as well as the original 2020 Signed 1040 Tax Return

OR

- I, the student, did not file a 2020 IRS Income Tax Return(s) and...
- I did **not** make any income in 2020 and will provide a Verification of Non-Filing Letter from the IRS dated after October 1, 2021
 - I did make income in 2020, will complete the table below, and provide a Verification of Non-Filing Letter from the IRS dated after October 1, 2021

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.

Please fill out this chart only if you the student are a non-tax filer and you <u>did</u> make income. Please provide W-2s for each job.		
Employer Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2020
<i>Example: ABC Auto Shop</i>	<i>Yes</i>	<i>\$3,100</i>
		\$
		\$
Total Amount of Income Earned from Work		\$

4. Spouse 2020 Income Information

- I, the spouse, did file a 2020 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 copy of the 2020 Tax Return Transcript or 2020 Signed 1040 Tax Return with Schedules 1, 2, and/or 3 if applicable
 - Filed taxes as “married filing separately”, and will provide signed copies of both tax returns
 - Amended the 2020 IRS Income Tax Return(s) and will provide a signed copy of the 2020 IRS Form 1040x as well as the original 2020 Signed 1040 Tax Return

OR

- I, the spouse, did not file a 2020 IRS Income Tax Return(s) and...
- I did **not** make any income in 2020 and will provide a Verification of Non-Filing Letter from the IRS dated after October 1, 2021
 - I did make income in 2020, will complete the table below, and provide a Verification of Non-Filing Letter from the IRS dated after October 1, 2021

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.

Please fill out this chart only if you the spouse are a non-tax filer and you <u>did</u> make income. Please provide W-2s for each job.		
Employer Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2020
<i>Example: ABC Auto Shop</i>	<i>Yes</i>	<i>\$3,100</i>
		\$
		\$
Total Amount of Income Earned from Work		\$

5. Certification & Signature

I certify that the information included herein is true and accurate to the best of my knowledge and is not falsely represented.

Student's Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

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