



# Milwaukee School of Engineering 2023-2024 Dependent Verification Worksheet

Your 2023-2024 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 1<sup>st</sup>, 2023, or 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](http://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 2021 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](http://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 a **Dependent Student**. Please note that dependency status for the FAFSA and for taxes are different. As a dependent student you must provide parental information on the FAFSA and for verification. Please verify the members in your parent(s) household. Include in the table below all household members. If your parents are separated, please list the household information of the parent you filed the FAFSA with.

### Household members include:

- The student
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. 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 other person's support through June 30, 2024

**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, 2023, and June 30, 2024, and include the name of the college.

**Write the name, age, and relationship (to you, the student) of all household members, including parents.** 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 2021 Income Information

☐ I, the student, did file a 2021 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 my 2021 IRS Tax Return Transcript or Signed 1040 Tax Return with Schedules 1, 2, and/or 3 if applicable
- ☐ I amended my 2021 IRS Income Tax Return(s) and will provide a signed copy of the 2021 IRS Form 1040x as well as the original 2021 Signed 1040 Tax Return

OR

☐ I, the student, did not file a 2021 IRS Income Tax Return(s) and...

- ☐ I did **not** make any income in 2021
- ☐ I did make income in 2021, and will complete the table 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.

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 2021
<i>Example: ABC Auto Shop</i>	<i>Yes</i>	<i>\$3,100</i>
		\$
		\$
Total Amount of Income Earned from Work		\$

### 4. Parent 2021 Income Information

☐ I/we, the parent(s), did file a 2021 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 2021 Tax Return Transcript or 2021 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 2021 IRS Income Tax Return(s) and will provide a signed copy of the 2021 IRS Form 1040x as well as the original 2021 Signed 1040 Tax Return

OR

☐ I/we, the parent(s), did not file a 2021 IRS Income Tax Return(s) and...

- ☐ I did **not** make any income in 2021, and will provide a confirmation of non-filing letter from the IRS dated after October 1, 2022
- ☐ I did make income in 2021, will complete the table below, and provide a Verification of Non-Filing Letter from the IRS dated after October 1, 2022

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 parents(s) 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 2021
	<i>Example: ABC Auto Shop</i>	<i>Yes</i>	<i>\$3,100</i>
Parent/ Step-Parent 1			\$
			\$
Parent/ Step-Parent 2			\$
			\$
	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: \_\_\_\_\_

Parent's Signature: \_\_\_\_\_ Date: \_\_\_\_\_ \*This must be a parent reported on the FAFSA.

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