



MULTNOMAH  
UNIVERSITY

Multnomah University Office of Financial Aid

## VERIFICATION WORKSHEET (INDEPENDENT)

2019-2020 Academic Year

### STEP 1 – STUDENT INFORMATION

First	Last	Social Security Number
Email Address		Cell Phone

### STEP 2 – STUDENT HOUSEHOLD INFORMATION

List the people in your household, including yourself. Indicate those who will be attending college at least half time between July 1, 2019 and June 30, 2020, and will be enrolled in a degree, diploma, or certification program.

Who to include in your household:

- **Yourself (the student)**
- **Your spouse (if married)**
- **Yours and/or your spouse's children** if you or your spouse will provide more than half of their support from July 1, 2019 through June 30, 2020
- **Other people** only if they now live in your household and you or your spouse will provide more than half of their support from July 1, 2019 through June 30, 2020

Full Name	Age	Relationship	Attending College In 2019/2020?	Name of College Attending
		SELF		

\*List additional people on the back of this sheet, if applicable

### STEP 3 – 2017 INCOME AND TAX INFORMATION

**Tax filers:** Complete this section if you (the student) filed or will file a 2017 tax return. If you did not file taxes in 2017 DO NOT complete this section but proceed to the *Non-tax filers* section below.

**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student and spouse filed separate IRS income tax returns for 2017 or had a change in marital status after December 31, 2017.

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of the FAFSA. In most cases, no further documentation is needed to verify income information that was transferred to the FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- ☐ I **have used** the IRS Data Retrieval Tool (DRT) in my 2019-2020 FAFSA to transfer my 2017 IRS income tax return information into my FAFSA.
- ☐ I **will use** the IRS Data Retrieval Tool (DRT) by logging into my 2019-2020 FAFSA to import my 2017 IRS income tax return information into my FAFSA.
- ☐ I **am unable or choose not to use** the Data Retrieval Tool (DRT) to import my 2017 tax information into my FAFSA, and instead will provide the school with a 2017 IRS Tax Return Transcript.

A 2017 IRS Tax Return Transcript may be obtained through:

- Get Transcript by MAIL: Go to [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript), click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript ONLINE: Go to [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript), click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- If you are unable to obtain your Tax Return Transcript online or via mail, contact the Financial Aid Office for further instructions.

**If you and your spouse filed separate 2017 IRS income tax returns, the IRS DRT cannot be used, and the 2017 IRS Tax Return Transcript(s) must be provided for each.**

- ☐ Check here if a 2017 IRS Tax Return Transcript is provided.
- ☐ Check here if a 2017 IRS Tax Return Transcript will be provided later.

**Non-tax filers:** Complete this section if you did not file taxes for 2017 and were not required to do so.

**Important Note:** The instructions and certifications below apply to the student and spouse, if the student is married.

## Part 1.

**Provide documentation from the IRS, or other relevant tax authority, dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS.**

A Verification of Nonfiling letter may be obtained from the IRS by submitting IRS Form 4506-T and checking box 7.

- ☐ Check here if a 2017 IRS Verification of Nonfiling letter is provided.
- ☐ Check here if a 2017 IRS Verification of Nonfiling letter will be provided later.

## Part 2.

Check the box that applies:

- ☐ **Neither I, nor my spouse if married, were employed nor had any income earned from work in 2017.**

IMPORTANT NOTE: If you selected this option, AND you indicated that you support children on your FAFSA, you must complete the Multnomah Office of Financial Aid Proof of Support Worksheet.

- ☐ Check here if the Proof of Support Worksheet is included (if applicable)
- ☐ Check here if the Proof of Support Worksheet will be provided later (if applicable)

- ☐ **I and/or my spouse was/were employed and had some income earned from work in 2017 but was/were not required to file a 2017 IRS tax return. I have listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 or an equivalent document is provided (provide copies of all 2017 IRS W-2s issued).**

Employer's Name	IRS W-2 or Equivalent Provided?	Annual Amount Earned in 2017
		\$
		\$
		\$
Total Income Earned from Work for 2017		\$

*\*If more space is needed, provide a separate page with the student's name and ID number at the top.*

## STEP 5 – CERTIFICATION AND SIGNATURES

By signing this worksheet, I certify that all the information reported is complete and correct.

\_\_\_\_\_  
Signature of Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Spouse (when applicable)

\_\_\_\_\_  
Date

**Please return to the Multnomah University Office of Financial Aid. Do not mail this worksheet to the U.S. Department of Education.**