

2021-22 Verification Dependent Student Form

V5 – Aggregate Verification Group

Your 2021–2022 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. About 30% of all FAFSA filers are selected for verification, which requires the school to collect documentation to review the accuracy of FAFSA information. EFSC cannot award federal financial aid until this worksheet has been processed.

Priority Deadlines*: Fall 2021 – 07/22/21 | Spring 2022 – 11/29/21 | Summer 2022 – 04/21/22

THIS DOCUMENT MUST BE ORIGINAL – NO PHOTOCOPIES OR SCANS ACCEPTED

A. Student Information

| | | | |
|-----------|------------|------|------------|
| | | | B# _____ |
| Last Name | First Name | M.I. | Student ID |

B. Household Information

List below the people in your parent’s household. Include only the following:

- Yourself.
- Your parent(s) (including a stepparent) even if you do not live with your parent(s).
- Your parent’s other children if your parent(s) will provide more than half of the children’s support from July 1, 2021, through June 30, 2022 or if the other children would be required to provide parental information if they were completing a FAFSA for 2021-22. Include children who meet either of these standards, even if the child does not live with your parents.
- Other people if they now live with your parent(s) and your parent(s) provide 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, 2022.
- If you list below any dependents between the ages of 24 and 64, you must also submit the **2021-22 Household Dependents Form**.

| Full Name | Age | Relationship | College <i>(List only if household member will attend at least ½ time; Do not include dual-enrolled high school students)</i> | Will be Enrolled at Least ½ Time? (Yes or No) |
|-----------|-----|--------------|---|--|
| | | Self | Eastern Florida State College | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

If more space is needed, submit a separate page with your name and B number. EFSC may require additional documentation if we have reason to believe the information regarding the household members is incomplete or inaccurate.

* This form must be submitted by the priority deadline to ensure a determination of eligibility before the Fee Due Date. Students may still apply for aid after the priority deadlines, but EFSC cannot guarantee that late submissions will be notified of aid eligibility prior to the Fee Due Date.

C. Student Income Information – *You must check only 1 box below.*

- I filed a 2019 IRS tax return. – *Go to Section #1 below.*
- I did not and will not file a 2019 IRS tax return. – *Go to Section #2 on page 3.*
- I was granted a tax extension, filed an amended return, was a victim of IRS tax-related identify theft, or filed a non-IRS income tax return for 2019. – *Go to Section #3 on page 4.*

1. STUDENT TAX RETURN FILERS (IRS FORM 1040)

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of *FAFSA on the Web* at [FAFSA.gov](https://fafsa.gov). Use of the IRS DRT is **strongly** recommended.

Check the box that applies:

- I **have used** the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2019 IRS income tax return information into my FAFSA.
- I **have not yet used** the IRS Data Retrieval Tool in the FAFSA, but **will use** the tool to transfer 2019 IRS income tax return information into my FAFSA. *Verification cannot be completed until the IRS information has been transferred into the FAFSA.*
- I am **unable or choose not to** use the IRS Data Retrieval Tool in the FAFSA. I will submit to EFSC a **2019 IRS tax return transcript** or a **signed copy of the 2019 IRS Form 1040** I filed with the IRS. You must check **one** box below.
 - My 2019 IRS tax return transcript is **attached** to this worksheet.
 - My 2019 IRS tax return transcript **will be submitted to EFSC later**. *Verification cannot be completed until the IRS tax return transcript has been submitted to EFSC.*
 - My **signed** copy of the 2019 IRS Form 1040 and applicable schedules I filed with the IRS is **attached** to this worksheet.
 - My **signed** copy of the 2019 IRS tax form 1040 and applicable schedules I filed with the IRS **will be submitted to EFSC later**. *Eligibility for aid cannot be determined until one of the IRS tax documents is received.*

A **2019 IRS Tax Return Transcript** may be obtained through:

Get Transcript ONLINE

- Go to www.irs.gov and click on "Get Your Tax Record." Click on "Get Transcript Online."
- To use the new Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Get Transcript by MAIL

- Go to www.irs.gov and click on "Get Your Tax Record." Click on "Get Transcript by Mail."
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Paper Request Form

- Complete **IRS Form 4506-EZ** and mail or fax to the IRS.
- Do NOT request to have your transcript mailed directly to EFSC.
- Please allow a minimum of 5-10 days to receive the transcript.

Go to Section D on page 5.

2. STUDENT TAX RETURN NONFILERS

Complete this section if you will not file and are not required to file a 2019 income tax return with the IRS.

Check the box that applies:

- I **was not employed** and had no income earned from work in 2019.
- I **was employed in 2019** and have listed below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is attached. You are required to submit a copy of each W-2 that was issued. List every employer even if they did not issue an IRS W-2 form.

| Employer's Name | IRS W-2 Issued by Employer | IRS W-2 Attached | 2019 Amount Earned |
|---|----------------------------|---------------------|----------------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>Yes(example)</i> | <i>Yes(example)</i> | <i>\$2,000.00(example)</i> |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total Amount of Income Earned From Work | | | \$ |

Go to Section D on page 5.

3. STUDENT TAX FILERS WITH UNUSUAL CIRCUMSTANCES

If you are a tax filer with unusual circumstances for 2019, indicate below and submit all required documents listed. *Verification cannot be completed until all documents are submitted.* **Check the box that applies:**

- I was granted a **filing extension** by the IRS.

If you are required to file a 2019 IRS income tax return and have been granted a filing extension by the IRS you must provide:

- A copy of IRS Form 4868, “*Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,*” that was filed with the IRS for tax year 2019; **AND**
- A copy of the IRS’s approval of an extension beyond the automatic six-month extension; **AND**
- *Verification of Non-filing Letter* (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2020; **AND**
- A copy of IRS Form W–2 for each source of employment income received for tax year 2019 and, if self-employed, a signed statement certifying the amount of your Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2019.

- I filed an **amended IRS income tax return** (1040X).

If you filed an amended IRS income tax return for tax year 2019 you must provide:

- A 2019 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified **AND**
- A signed copy of the 2019 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

- I am a victim of IRS tax-related **identity theft**.

If you were a victim of IRS tax-related identity theft you must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS by calling the Identify Protection Specialized Unit (IPSU) at 1-800-908-4490, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified **AND**
- A statement signed and dated by you indicating that you were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

- I filed a **non-IRS income tax return**.

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

Go to Section D on page 5.

D. Parent Income Information – *You must check only 1 box below.*

NOTE: The instructions below apply to **each parent** included in the household in **Section B** of this worksheet. Notify the Office of Financial Aid if your parents had a change in marital status after December 31, 2020.

- My parent(s) filed a 2019 IRS tax return. – *Go to Section #1 below.*
- My parents(s) did not and will not file a 2019 IRS tax return. – *Go to Section #2 on page 6.*
- My parents(s) was/were granted a tax extension, filed an amended return, was a victim of IRS tax-related identify theft, or filed a non-IRS income tax return for 2019. – *Go to Section #3 on page 7.*

1. PARENT IRS TAX RETURN FILERS (IRS FORM 1040)

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of *FAFSA on the Web* at [FAFSA.gov](https://fafsa.gov). Use of the IRS DRT is **strongly** recommended.

Check the box that applies:

- My parent(s) **already used** the IRS Data Retrieval Tool (DRT) in *FAFSA on the Web* to transfer 2019 IRS income tax return information into my FAFSA
- My parent(s) **have not yet used** the IRS Data Retrieval Tool in the FAFSA, but **will use** the tool to transfer 2019 IRS income tax return information into my FAFSA. *Verification cannot be completed until the IRS information has been transferred into the FAFSA.*
- My parent(s) are **unable or choose not to** use the IRS Data Retrieval Tool in the FAFSA. I will submit to EFSC a **2019 IRS tax return transcript** or a **signed copy of the 2019 IRS Form 1040** my parent(s) filed with IRS. You must check one box below.
 - My parents' 2019 IRS tax return transcript is **attached** to this worksheet.
 - My parents' 2019 IRS tax return transcript **will be submitted to EFSC later**. *Verification cannot be completed until the IRS tax return transcript has been submitted to EFSC.*
 - My parent's **signed** copy of the 2019 IRS Form 1040 and applicable schedules filed with the IRS is **attached** to this worksheet.
 - My parent's **signed** copy of the 2019 IRS tax form 1040 and applicable schedules filed with the IRS **will be submitted to EFSC later**. *Eligibility for aid cannot be determined until one of the IRS tax documents is received.*

A **2019 IRS Tax Return Transcript** may be obtained through:

Get Transcript ONLINE

- Go to www.irs.gov and click on "Get Your Tax Record." Click on "Get Transcript Online."
- To use the new Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Get Transcript by MAIL

- Go to www.irs.gov and click on "Get Your Tax Record." Click on "Get Transcript by Mail."
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Paper Request Form

- Complete **IRS Form 4506-EZ** and mail or fax to the IRS.
- Do NOT request to have your transcript mailed directly to EFSC.
- Please allow a minimum of 5-10 days to receive the transcript.
 - Do NOT request to have your transcript mailed directly to EFSC.
 - Please allow a minimum of 5-10 days to receive the transcript.

Go to Section E on page 8.

2. PARENT TAX RETURN NONFILERS

Complete this section if your parent(s) will not file and is/are not required to file a 2019 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed and **neither had income earned from work** in 2019.
- One or both** parents **was/were employed** in 2019 and have listed below the names of all their employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is attached. You are required to submit a copy of each W-2 that was issued. List every employer even if they did not issue an IRS W-2 form.

| Employer's Name | IRS W-2 Issued by Employer | IRS W-2 Attached | 2019 Amount Earned |
|---|----------------------------|---------------------|----------------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>Yes(example)</i> | <i>Yes(example)</i> | <i>\$2,000.00(example)</i> |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total Amount of Income Earned From Work | | | \$ |

Your parents(s) MUST submit an IRS Verification of Non-filing Letter. This is a new federal requirement for 2020-21 and applies even if your parents earned zero income in 2019.

- My parents' 2019 IRS Verification of Non-filing Letter(s) is/are **attached** to this worksheet.
- My parents' 2019 IRS Verification of Non-filing Letter(s) **will be submitted to EFSC later.**
Verification cannot be completed until the IRS tax return transcript has been submitted to EFSC.

A **2019 IRS Verification of Non-filing Letter** may be obtained through the following methods.

NOTE: if your parents have NEVER filed a tax return, they MUST use the Paper Request Form.

Get Transcript ONLINE

- Go to www.irs.gov, click under the Tools heading, click "Get Your Tax Record."
- Click "Get Transcript Online."
- Make sure to request the "Verification of Non-Filing Letter."

Get Transcript by MAIL

- Go to www.irs.gov, click under the Tools heading, click "Get Your Tax Record."
- Click "Get Transcript by Mail."
- Make sure to request the "Verification of Non-Filing Letter."

Paper Request Form

- Complete [IRS Form 4506-T](#) and mail or fax to the IRS
- Do NOT request to have your Verification of Non-Filing mailed directly to EFSC.
- Please allow a minimum of 5-10 days to receive the Verification of Non-Filing.

Go to Section E on page 8.

3. PARENT TAX FILERS WITH UNUSUAL CIRCUMSTANCES

If your parent(s) is/are a tax filer(s) with unusual circumstances for 2019, indicate below and submit all required documents listed. *Verification will not be completed until all required documents listed below are submitted.*

Check the box that applies:

- I was granted a **filing extension** by the IRS.

If you are required to file a 2019 IRS income tax return and have been granted a filing extension by the IRS you must provide:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2019; **AND**
- A copy of the IRS's approval of an extension beyond the automatic six-month extension; **AND**
- *Verification of Non-filing Letter* (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2020; **AND**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2019 and, if self-employed, a signed statement certifying the amount of your Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2019.

- I filed an **amended IRS income tax return** (1040X).

If you filed an amended IRS income tax return for tax year 2019 you must provide:

- A 2019 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified **AND**
- A signed copy of the 2019 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

- I am a victim of IRS tax-related **identity theft**.

If you were a victim of IRS tax-related identity theft you must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS by calling the Identify Protection Specialized Unit (IPSU) at 1-800-908-4490, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified **AND**
- A statement signed and dated by you indicating that you were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

- I filed a **non-IRS income tax return**.

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

Go to Section E on page 8.

E. High School Completion Status

Please indicate your high school completion status when you begin college in 2021–2022:

- I received or will have received a **high school diploma**.
- I completed or will have **completed secondary education in a foreign country** and have a copy of the “secondary school leaving certificate” or other similar document.
- I have or will have **passed a state authorized examination** (GED test, HiSET, TASC, or other State-authorized examination).
- I completed or will have completed at least a **two-year program that is acceptable for full credit towards a bachelor’s degree**.
- I was **homeschooled**.

F. Identity and Statement of Educational Purpose Signed at EFSC

You **must appear in person at Eastern Florida State College’s Office of Financial Aid** to verify your identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. EFSC will maintain a photocopy of ID.

In addition, you must sign, in the presence of an institutional official, the Statement of Educational Purpose provided below.

If you are unable to appear in person at EFC you must complete **Section G** in the presence of a notary.

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student’s Name)

Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Eastern Florida State College for 2021-2022.

(Student’s Signature)

(Date)

(Student’s ID Number)

EFSC Financial Aid Campus Specialist Use Only:

Type of Document Received _____

Expiration Date _____

Received By (Print Name) _____

Received By (Signature) _____

Copy Made of Document

G. Identity and Statement of Educational Purpose To Be Signed With Notary

Complete Section G **ONLY** if you are **UNABLE TO APPEAR IN PERSON** at Eastern Florida State College.

You submit to EFSC:

- A **copy** of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; **AND**
- The **original** notarized Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student's Name)

Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Eastern Florida State College for 2021-2022.

(Student's Signature)

(Date)

(Student's ID Number)

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____, personally appeared,
(Date) (Notary's name)

_____, and proved to me on the basis of satisfactory evidence of identification
(Printed name of signer)

_____ to be the above-named person who signed the foregoing instrument.
(Type of unexpired government-issued photo ID provided)

WITNESS my hand and official seal

(Notary's Signature)

(seal)

My commission expires on _____
(Date)

H. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

Student's Original Signature (*cannot be signed electronically*)

Date

Parent's Original Signature (*cannot be signed electronically*)

Date

I. Document Submission

You may submit this document by the following methods:

1. FINANCIAL AID DOCUMENT UPLOAD TOOL (RECOMMENDED)

Complete and sign this document, scan, and upload using the **Financial Aid Document Upload Tool** in **myEFSC** under *Financial Aid Forms & Upload*.

2. BY MAIL

Mail your document to the Office of Financial Aid at:
Eastern Florida State College
Office of Financial Aid
Building 2, Room 209
1519 Clearlake Road
Cocoa, FL 32922

3. IN-PERSON

Please visit easternflorida.edu/go/aidcontacts for current hours and availability.

QUESTIONS?

Financial Aid Specialists are available by phone at 321-433-7339 and via e-mail at finaid@easternflorida.edu.

Eastern Florida State College is committed to equal access/equal opportunity in its programs, activities, and employment. For additional information, visit Eastern Florida State College: easternflorida.edu/go/equity.