

# Milwaukee School of Engineering 2018-2019 Verification Worksheet

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) was selected for a review process called "Verification." In this process, MSOE will compare the information you reported on the FAFSA to the documentation requested. MSOE is required to review the requested information under 34 CFR, Part 668.

**Please submit all required documentation as soon as possible.** If you use the IRS Data Retrieval Tool and/or send FAFSA corrections, please note that it can take up to a week to process. Your financial aid will not be determined and disbursed until all verification requirements are completed.

Note: Our system will send reminders every 21 days until all documents are received.

**What to do:**

1. Complete steps 1 – 5 and sign the Verification Worksheet. **Make sure to carefully read all instructions as errors can delay processing of your financial aid.**
2. Submit all required documents to the MSOE Financial Aid Office via email (finaid@msoe.edu), fax (414-277-6952), in person (CC431), or mailed to the address on the next page.

## 1. Student Information

Name: \_\_\_\_\_ MSOE ID Number: \_\_\_\_\_

Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

City, State Zip: \_\_\_\_\_ Phone Number: \_\_\_\_\_

***Do you have to include parental information?***

A student is considered *dependent* and is required to include parental information *unless* one of the following is applicable:

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>→ The student was born before January 1, 1995</li> <li>→ The student is married</li> <li>→ The student supports children or other dependents</li> <li>→ The student was an emancipated minor</li> </ul> | <ul style="list-style-type: none"> <li>→ The student was in legal guardianship, a ward of the court, or an orphan</li> <li>→ The student is homeless or at risk of being homeless</li> <li>→ The student is a veteran of the U.S. Armed Forces (or active duty for purposes other than training)</li> <li>→ The student is working on a master's or doctorate degree</li> </ul> |
|--|---|

\*If you believe you have special circumstances in relation to providing parental information, please contact our office.

## 2. Family Information

→ **Dependent** students should list:

- Themselves
- Their parents (including a stepparent, if applicable)
- Their siblings (including step-siblings, if applicable)
- Their parents' other dependents (if applicable)\*

→ **Independent** students should list:

- Themselves
- Their spouse (if applicable)
- Their children (including step-children, if applicable)
- Their other dependents (if applicable)\*

*\*Dependents are described as someone receiving more than 50% of support, or would be required to provide parental information when applying for Federal Student Aid.*

**Write the name, age, and relationship (to you, the student) of all household members.** Also write in the name of the college for any household member, excluding your parent(s), who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary institution any time between July 1, 2018 and June 30, 2019. *If you need more space, please attach a separate page.*

Full Name	Age	Relationship	College*
		Self	Milwaukee School of Engineering

### 3. Student Income Information

Please check **ONLY** one option below.

Non-Tax Filers	Tax-Filers
<p><input type="radio"/> <b>I, the student, did not file a 2016 federal tax return but earned taxable income in 2016.</b></p> <p>→ I have/will provide copies of all 2016 W-2 forms, earnings statements.</p> <p>→ <i>Independent students only:</i> I have/will provide a Verification of Non-Filing Letter from the IRS dated on or after October 1<sup>st</sup>, 2017.</p> <p><input type="radio"/> <b>I, the student, was not employed and had no income earned from work in 2016.</b></p> <p>→ <i>Independent students only:</i> I have/will provide a Verification of Non-Filing Letter from the IRS dated on or after October 1<sup>st</sup>, 2017.</p>	<p><input type="radio"/> <b>I, the student, did file a 2016 federal tax return and have used/will use the IRS Data Retrieval Tool on the FAFSA or will provide the school a 2016 IRS Tax Return Transcript.</b></p> <p>→ Copies of 2016 W-2 forms are/will be submitted.</p> <p><input type="radio"/> <b>I, the student, filed an amended tax return (1040X) and have/will provide a copy of the 2016 IRS Tax Return Transcript and a signed copy of the 2016 amended tax return (form 1040X).</b></p> <p>→ Copies of 2016 W-2 forms are/will be submitted.</p>

### 4. Parent Income Information (if not applicable, leave blank)

Please check **ONLY** one option below.

Non-Tax Filers	Tax-Filers
<p><input type="radio"/> <b>I/we, the parent(s), did not file a 2016 federal tax return but earned taxable income in 2016.</b></p> <p>→ I have/will provide copies of all 2016 W-2 forms, earnings statements.</p> <p>→ I have/will provide a Verification of Non-Filing Letter from the IRS dated on or after October 1<sup>st</sup>, 2017.</p> <p><input type="radio"/> <b>I/we, the parent(s), was/were not employed and had no income earned from work in 2016.</b></p> <p>→ I have/will provide a Verification of Non-Filing Letter from the IRS dated on or after October 1<sup>st</sup>, 2017.</p>	<p><input type="radio"/> <b>I/we, the parent(s), did file a 2016 federal tax return and have used/will use the IRS Data Retrieval Tool on the FAFSA or will provide the school a 2016 IRS Tax Return Transcript.</b></p> <p>→ Copies of W-2 forms are/will be submitted.</p> <p><input type="radio"/> <b>I/we, the parent(s), filed an amended tax return (1040X) and have/will provide a copy of the 2016 IRS Tax Return Transcript and a signed copy of the 2016 amended tax return (form 1040X).</b></p> <p>→ Copies of W-2 forms are/will be submitted.</p>

→ To get a copy of a 2016 IRS Tax Return Transcript, use the “Get Transcript” tool on [www.irs.gov](http://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.

→ To get a copy of a 2016 Verification of Non-Filing Letter, 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.

### 5. Certification & Signature

**BEFORE YOU SUBMIT THIS WORKSHEET:**

- Have you completed the family information section of this form?
- Have you answered income questions for both student and parent (if applicable)?
- Have you included all required documentation, such as W-2s?
- Have both student and parent (if applicable) 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: Electronic (typed) signatures will *not* be accepted.**

Student’s Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent’s Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(Dependent Students Only)

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

Please return fully completed and signed worksheet to: