Clear Form

2023-2024 Dependent
V5 Aggregate Verification Worksheet

Your FAFSA application has been selected for a process called verification. Please complete all parts of this worksheet and return to the Financial Aid Office. Notice: incomplete forms may delay processing.

A. Student Information

Student's Name: _____ MPC ID | | | | | | | | |

B. Household Information – List the members in your parents' household. Attach an additional sheet if necessary.

Please include: yourself, even if you don't live with your parents, your parents/step-parent (if your parent is remarried you must include your step-parent), your parents' other children (even if they do not live with your parents), siblings, and individuals who will receive more than half of their support from your parents between July 1, 2023 and June 30, 2024.

Full Name	Relationship to Student	Age	Enrolled in College at least half-time (check one)		College
	Self		◯ Yes	◯ No	Monterey Peninsula College
			◯ Yes	◯ No	
			◯ Yes	◯ No	
			◯ Yes	◯ No	
			◯ Yes	◯ No	
			◯ Yes	◯ No	

C. Tell us about your 2021 tax filing status –

Student's Filing Status (select only one)

◯ I filed my 2021 return and successfully used the IRS Data Retrieval Tool via the FAFSA. **Tax transcript not required.**

◯ I filed my 2021 return and chose not to or, I am unable to use the IRS Data Retrieval Tool. **Submit your 2021 IRS Tax Return Transcript or signed Tax Return.**

◯ I amended my taxes after originally filing my 2021 return and will submit:
  o 2021 IRS Tax Return Transcript or signed Tax Return
  o 2021 Signed IRS 1040X form

◯ I did not and I am not required to file a federal tax return. I was not employed and earned no income from work in 2021.

◯ I did not and I am not required to file a federal tax return. In 2021, I earned $_____ from the source(s) listed below:

Employer's Name	2021 Earned Amount	IRS W-2 Attached	
		◯ Yes	◯ No
		◯ Yes	◯ No
		◯ Yes	◯ No
Attach all W-2s issued to you in 2021			

*IRS Verification of Non-Filing Letters can be requested by checking box 7 and 8 (if no W-2s provided) on IRS Form 4506-T. **Notice:** 2021 IRS Verification of Non-Filing Letters <u>must</u> be dated *on or after* October 1, 2022.

Parent(s) Filing Status (select only one)

◯ My parent(s) filed their 2021 return and successfully used the IRS Data Retrieval Tool via the FAFSA. **Tax transcript not required.**

◯ My parent(s) filed their 2021 tax return and chose not to or, were not able to use the IRS Data Retrieval Tool. **Submit parent's 2021 IRS Tax Return Transcript or Tax Return.**

◯ My parent(s) amended their taxes after originally filing their return and will submit:
  o 2021 IRS Tax Return Transcript or signed Tax Return
  o 2021 Signed IRS 1040X form

◯ My parent(s) did not and is/are not required to file a federal tax return. My parent(s) were not employed and earned no income from work in 2021. **Submit 2021 IRS Verification of Non-filing Letter***

◯ My parent(s) did not and is/are not required to file a federal tax return. In 2021, my parent(s) earned $_____ from the source(s) listed below: **Submit 2021 IRS Verification of Non-filing Letter***

Employer's Name	2021 Earned Amount	IRS W-2 Attached	
		◯ Yes	◯ No
		◯ Yes	◯ No
		◯ Yes	◯ No
Attach all W-2s issued to your parent(s) in 2021			

D. Certification and Signatures – Each person signing this worksheet certifies that all of the information reported on it 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 you may be fined, sentenced to jail, or both.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

This worksheet must be signed and dated to be valid.

Monterey Peninsula College – Financial Aid Office – 980 Fremont Street, Monterey CA 93940
Phone (831) 646-4030 – Email: financialaid@mpc.edu
www.mpc.edu/financialaid

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IRS Data Retrieval Tool
and Tax Return Transcripts Instructions

How to use the IRS Data Retrieval Tool in FAFSA

The best way to verify tax return information is by using the IRS Data Retrieval Tool which is part of the FAFSA on the Web application. If the student or parent(s) have not already used the tool,

- Go to www.studentaid.gov
- Login to the student's FAFSA using their FSA ID (https://studentaid.gov/fsa-id/sign-in/landing)
- Select **Make FAFSA Corrections** and then enter a **Save Key**
- Navigate to the **Financial Information** section of the application
- Follow the on-screen instructions. Based on your answers FAFSA will determine if the student or parent(s) can use the IRS Data Retrieval Tool to transfer <u>2021</u> IRS income tax information into the FAFSA. If eligible to use the tool you will see a button that says **Link to IRS**
- Click the **Link to IRS button** which will redirect you to the Internal Revenue Service web site. A message will display explaining you are 'leaving FAFSA on the web'. To continue with transferring your information, click **Proceed to IRS site Notice:** for parent's, you must enter the parent's FSA ID <u>before</u> clicking the **Link to IRS** button.
  - Generally most, if not all, of the following fields' information is populated into the corresponding fields based on the answers reported on the FAFSA: *First Name, Last Name, Social Security Number, Date of Birth and filing status*. However, if this information is not pre-populated you will need to enter it.
  - Enter your address (***must** match your <u>2021</u> Federal Income Tax Return*), city, state and zip code. Click **Submit** in the bottom right corner of the page.
- To transfer the data, click the box to place a check mark under **Transfer My Tax Information into the FAFSA** section and then click the **Transfer Now** button.

Once you've transferred the data into FAFSA you will see **Transferred from the IRS** next to each question where the information was transferred. **Notice: <u>do not</u> click 'save' and exit the application as you still need to finish the rest of the application.** At the end of the application you need to make sure you, and your parent (if applicable), sign your FAFSA using your FSA ID.

How to request your 2021 Tax Return Transcripts from the IRS

From the IRS website, you can request a tax return transcript through their Get Transcript Online or Get Transcript by Mail options. You can also contact the IRS by phone to request your tax return transcript. **Note:** *the method you used to file your return and whether you have a refund or balance due, affects your* current year transcript availability.

Get **Transcript Online**	Get **Transcript by Mail**	Get Transcript by **Phone**
To use this service you need: • Full Name; • Email; • Date of birth; • Your Social Security Number or Individual Tax Identification Number (ITIN); • Tax Filing Status; • Current address; • Government issued identification card, • Mobile phone with your name on the account. **Note:** if account setup is successful you will be able to download and/or print your tax return transcript.	To use this service you need: • Your Social Security Number or Individual Tax Identification Number (ITIN); • Date of birth and, • Mailing address from your latest tax return **Note:** transcripts generally arrive in 5-10 calendar days to the address the IRS has on file for you. The IRS will never send an email requesting that you obtain or access your transcripts. If you receive such a notice, please forward to the IRS fraud group at phishing@irs.gov.	Call (800) 908-9946 and follow the telephone prompts.
Notice: Be sure to request an IRS Tax Return Transcript – <u>not</u> an IRS Tax Account Transcript.		

How to request an IRS Verification of Non-Filing Letter for 2021

Go to the IRS website at https://www.irs.gov/ and click on Search Forms & Instructions. On this page click to select Form 4506-T and follow the instructions on the form. IRS Verification of Non-Filing Letters can be requested by checking box 7 and 8 (if no W-2s provided) on IRS Form 4506-T. **Notice:** 2021 IRS Verification of Non-Filing Letters <u>must</u> be dated *on or after* October 1, 2022.

DO NOT COMPLETE THIS SECTION IN ADVANCE

E. Student Information

Student's Name: _____ MPC ID [ ][ ][ ][ ][ ][ ][ ][ ]

F. Identity and Statement of Educational Purpose (To be signed at the institution)

The student _must appear in person_ at **Monterey Peninsula College** to verify his or her 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. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID. In addition, the student must sign, _in the presence of the institutional official_, the Statement of Educational Purpose provided below.

G. Identity and Statement of Educational Purpose (To be signed in the presence of a notary)

If the student is _unable to appear in person_ at **Monterey Peninsula College** to verify his or her identity, the student must provide to the institution:

(a) A copy of the _unexpired_ valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; **and**

(b) The _original_ Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a _separate page_ than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

H. Statement of Educational Purpose

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

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 **Monterey Peninsula College** for 2023-2024.

_____   _____
(Student's Signature)   (Date)

_____
(Student's ID Number)

I. Notary's Certificate of Acknowledgement

State of _____ City/County of _____

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

_____, and provided to me on the basis of satisfactory
(Printed name of signer)

evidence of identification _____ to be the above-named person who
(Type of unexpired government-issued photo ID provided)

signed the foregoing instrument.

WITNESS my hand and official seal

(Seal)   _____
                                       (Notary Signature)

                              My commission expires on _____

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This worksheet must be signed and dated to be valid. Electronic and/or digital signatures are not valid.

For Office Use Only	
Identity and Statement of Educational Purpose:	
☐ Copy of original unexpired valid government-issued photo identification (ID) presented to institutional official (financial aid staff)	
☐ Identification Type:	
Institutional Official Name:	
Institutional Official Signature:	Date:
High School Completion Status:	
☐ Acceptable documentation in file	☐ Type of documentation:
☐ Approved	☐ Denied
☐ ROAHSDT	☐ HSALT (update status to S)
Comment(s):	
Processed/Reviewed By:	Date:

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