



2022-2023 Verification Worksheet (V5)

Your application has been selected by the U.S. Department of Education for review in a process called "Verification". The Office of Financial Aid must compare your FAFSA with the information you provide on this worksheet and other financial documents. If there are differences between your application information and the documents you submit, your application may need to be corrected. **The Office of Financial Aid cannot make any federal financial aid payments available to you or process a student loan request until all verification requirements have been met and any necessary corrections have been made.**

Next Steps:

- 1. Complete the IRS Data retrieval through FAFSA on the Web.** If you cannot use the IRS Data Retrieval Tool, you may order a **2020 Tax Return Transcript** from the Internal Revenue Service online at www.irs.gov/transcript for yourself, your spouse (if married) or your parents/step-parent (if dependent).
- 2. Complete all sections and sign this worksheet in ink (electronic signature is not acceptable).**
- 3. Return all requested documents by mail or in person to:** *Office of Financial Aid, College of Mount Saint Vincent
6301 Riverdale Avenue
Riverdale, NY 10471*
- 4. If you are unable to present your documents in person, your Statement of Education Purpose must be notarized and can then be submitted by mail or by uploading the documents through your Admissions portal or through Self Service.**

A. Student Information (Please Print)

_____		_____	
Last Name	First Name	M.I.	CMSV ID #
_____		_____	
Address (include apt. #)		Date of Birth (mm/dd/yyyy)	
_____		_____	
City	State	Zip Code	Phone # (include area code)

B. Family Information (Please Print)

Check the appropriate boxes below and provide the requested information and documents:

Dependent Student: If you were required to report your parents' information on your FAFSA, you are considered to be a dependent student. In the chart below, list all the people in the household who will be supported by your parents between July 1, 2022 and June 30, 2023. Include yourself, your parents, and your parents' other children if (a) your parents provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. Include other people only if they live with your parents now and receive, and will continue to receive, more than half their support from them between July 1, 2022 and June 30, 2023.

Independent Student: If you were not required to provide your parents' information on your FAFSA, you are considered to be an independent student. In the chart below, list the people that you (and your spouse) will support between July 1, 2022 and June 30, 2023. Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2022– June30, 2023.

Write the names of **all** family members including **yourself**. Also write the name of the college for any family member who will be attending college at least half-time between July 1, 2022 and June 30, 2023 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Attach Additional Sheets if necessary. Last Name, First Name, Middle Initial	Age	Relationship (e.g. parent, sibling)	College (If attending in 2022-23)
		Self	College of Mount Saint Vincent

C. Tax Forms & Income Information (Please Print)

1. a) Check here if you and/or your parent(s) *successfully used the IRS Data Retrieval Tool Process*.
 b) Check here if you are attaching your **2020 Federal IRS Tax Return Transcript**.

2. List below any person who did not file taxes in 2020, but had an income. A W-2 must be submitted for each source of income. Parents/independent students must also submit an [IRS Verification of Non-Filing](https://www.irs.gov/transcript) request at [irs.gov/transcript](https://www.irs.gov/transcript)

Name of Non-Tax Filer in 2020	Name of Employer	Income Amount with W2

3. Both tax filers and non-tax filers must list any untaxed income received in 2020. **Be sure to enter zeroes if no funds were received.** Failure to complete this section will delay the processing of your financial aid.

Student/Spouse Parent(s)	FAFSA Questions 44 and/or 92	Parent(s)/ Step-
\$	Payments to tax-deferred pensions and savings plans [paid directly or withheld from earnings] including, but not limited to, amounts reported on W-2 Form Box 12a - 12d, codes D, E, F, G, H, and S. Don't include amounts reported in DD.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1 – total of lines 15 + 19.	\$
\$	Tax exempt interest income from IRS Form 1040 – line 2a.	\$
\$	Untaxed portions of IRA distributions and pensions from IRS Form 1040 – line 4a minus line 4b. Exclude rollovers. If negative, enter a zero here.	\$

D. Identity and Statement of Educational Purpose

As part of your selection for V5 verification, you must provide proof of your identity and reaffirm the statement of educational purpose that you signed when you completed the FAFSA. The Statement is to be signed in the presence of either a Financial Aid staff member or notary if you are unable to come to the Financial Aid Office in person.

You may provide proof identity by bringing the original, unexpired government-issued photo I.D., such as, but not limited to, driver's license, other state-issued I.D., or passport to either the Financial Aid Office or to a notary public. (This section continues on the next page with the Statement of Educational Purpose which must be signed in the presence of either a Financial Aid staff member or a notary.)

Statement of Educational Purpose

I certify that I _____ (print student's name) am the individual signing this Statement of Education 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 the College of Mount Saint Vincent.

Student's ink signature: _____ Date: _____

FA Staff signature: _____ Date: _____
(attach annotated copy of student's proof of identity)

If you are unable to present the document in person, you may provide a copy of the unexpired government-issued photo I.D. that you presented to a notary public to the Financial Aid Office via mail or secure upload method identified above along with the completed notary statement below.

Notary's Certificate of Acknowledgement

State of _____, City/County of _____, on _____, (date)
before me, _____, personally appeared _____,
(notary name) (student name)

and proved to me on the basis of satisfactory evidence of identification _____
(type of unexpired government-issued ID provided)
to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal
(seal)

Notary Signature: _____
My commission expires on (date): _____

E. Certification

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If the student is dependent, one parent must also sign. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____
(of dependent student)

Office Use Only

Verification completed by: _____
Authorized Signature Date