



**STUDENT INFORMATION**

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- If you filed a Federal Tax Return with the IRS, complete SECTION 1
  - If you filed and amended your taxes, complete SECTION 2
  - If you did not file taxes and were NOT required to file taxes, complete SECTION 3
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**SECTION 1**

- Please attach a copy of your 2014 IRS Tax Return Transcript. **If this Federal Verification Worksheet is submitted to the Financial Aid Office without your paper IRS Tax Return Transcript, your file will be considered incomplete.**

To obtain a **2014 IRS Tax Return Transcript**, go to [www.irs.gov](http://www.irs.gov) and click on the “Order a Return or Account Transcript” link. Make sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript.” In most cases, for electronic filers, a **2014 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2014 IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the **2014 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2014 paper IRS income tax return has been received by the IRS.

\_\_\_\_ Check here to confirm that your 2014 IRS Tax Return Transcript is attached. **If this Federal Verification Worksheet is submitted to the Financial Aid Office without your paper IRS Tax Return Transcript, your file will be considered incomplete.**

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**SECTION 2**

- You filed and **amended** your 2014 Federal Income Tax return originally filed with the IRS. As a result, you must **attach** a **2014 IRS Tax Return Transcript**; and a signed copy of the 2014 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” filed with the IRS. **If this Federal Verification Worksheet is submitted to the Financial Aid Office without your IRS Tax Return Transcript and IRS Form 1040X, your file will be considered incomplete.**

To obtain a **2014 IRS Tax Return Transcript**, go to [www.irs.gov](http://www.irs.gov) and click on the “Order a Return or Account Transcript” link. Make sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript.” In most cases, for electronic filers, a **2014 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2014 IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the **2014 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2014 paper IRS income tax return has been received by the IRS.

\_\_\_\_ Check here to confirm that a **2014 IRS Tax Return Transcript** is provided.

\_\_\_\_ Check here to confirm that a **2014 IRS Form 1040X** is provided

**SECTION 3**

**Check the appropriate box**

- Check here if you were not employed and had no income earned from work during 2014. Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS.
  
- Check here if you were employed during 2014. List the name of all employers and the amount earned from each employer. Attach copies of all 2014 W-2's received. List every employer even if they did not issue a W-2. *If a W-2 is not available, you must submit a signed statement certifying the amount of Adjusted Gross Income earned from work, the source of that income, and the reason why the W-2 is not available.*

Employer's Name	Amount Earned	IRS W2 Attached?
		Yes <input type="checkbox"/>
		Yes <input type="checkbox"/>
		Yes <input type="checkbox"/>

**PARENT INFORMATION**

The instructions below apply to the parent information listed on the DREAM App. Notify the Financial Aid Office if your parents filed a separate 2014 IRS Income Tax Returns and/or had a change in marital status at the end of the 2014 tax year.

- If your parent filed a Federal Tax Return with the IRS, complete SECTION 1
- If your parent filed and amended their taxes, complete SECTION 2
- If your parent did not file taxes and were NOT required to file, complete SECTION 3

**SECTION 1**

Please attach a copy of your parent's 2014 Federal Tax Return. If your parent filed a separate 2014 IRS income tax return, a 201 IRS Tax Return Transcript must be provided for both. **If this Federal Verification Worksheet is submitted to the Financial Aid Office without the paper IRS Tax Return Transcript, your file will be considered incomplete.**

To obtain a **2014 IRS Tax Return Transcript**, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." In most cases, for electronic filers, a **2014 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2014 IRS income tax return has been accepted by the IRS. Generally, for filers of 2014 paper IRS income tax returns, the **2014 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2014 paper IRS income tax return has been received by the IRS.

\_\_\_\_ Check here to confirm that your **2014 IRS Tax Return Transcript(s)** is attached.

**SECTION 2**

**Check the appropriate box**

Your parent filed and amended If you parent/guardian filed and amended their federal income tax return originally filed with the IRS. If so, they must provide a copy of their a **2014 IRS Tax Return Transcript** for the 2014 tax year; and a signed copy of the **2014 IRS Form 1040X**, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS. **If this Federal Verification Worksheet is submitted to the Financial Aid Office without your IRS Tax Return Transcript and IRS Form 1040X, your file will be considered incomplete.**

\_\_\_\_\_ Check here if a **2014 IRS Tax Return Transcript** is provided.

\_\_\_\_\_ Check here if a **2014 IRS Form 1040X** is provided.

**SECTION 3**

**Check the box that applies**

Your parents were not employed and had no income earned from work during 2014. Note: If necessary, we may require your parent to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS.

Your parents were employed during 2014. List the name of all employers and the amount earned from each employer. Attach copies of all 2014 W-2’s received. List every employer even if they did not issue a W-2. *If a W-2 is not available, you must submit a signed statement certifying the amount of Adjusted Gross Income earned from work, the source of that income, and the reason why the W-2 is not available.*

Employer’s Name	Amount Earned	IRS W2 Attached?
		Yes <input type="checkbox"/>
		Yes <input type="checkbox"/>
		Yes <input type="checkbox"/>

**OTHER INFORMATION**

**Complete this section ONLY if you reported on your DREAM Application that one (or both) of your parents paid child support in 2014. If your parent did not report this information on your DREAM Application, you are not required to complete this section.**

Either, one (or both) of my parents paid child support in 2014. It has been indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names for the children for whom child support was paid, and the total **annual** amount of child support that was paid in 2014 for each child.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2014

Note: If we have reason to believe that the information regarding child support paid is inaccurate; we may require additional documentation, such as:



## VERIFICATION WORKSHEET CHECKLIST

- Is the 2015-2016 Verification Worksheet completely filled out and signed by the student and parent?
- If you were unable to OR chose not to use the IRS Data Retrieval Tool, did you attach a copy of your and your parent(s) 2014 Federal Tax Return Transcript and/or Account Transcript? **If you do not have a copy of your and your parents 2014 Federal Tax Return Transcript and/or Account Transcript, DO NOT submit this worksheet. Your file will not be processed.**

### PLEASE NOTE

Incomplete Verification Worksheets will **NOT** be processed regardless of circumstance. To ensure timely processing of your documents, we strongly encourage you to submit all documents by the priority document deadline listed on the Financial Aid Website.

If your documents are complete, please allow 2-3 weeks for processing from the date when you submitted your documents. All documents can be faxed, mailed, or submitted in person to the Financial Aid Office. Submit all Verification Documents as one packet. If you fax your documents, please allow 48 hours to confirm receipt of documents with the Financial Aid Office. Documents received will be removed from your "To Do" List on CMS.

Your Financial Aid Counselor will contact you via your CSUMB Email if additional follow up is needed from you. Please follow up with all requests in a timely manner.

**DO NOT SUBMIT THIS PAGE**