

## 2020-2021 VERIFICATION WORKSHEET - DEPENDENT (V5)

Please read the entire form, complete ALL sections, attach the requested documentation, sign the form, and return to the Office of Financial Aid and Scholarships. Federal regulations require that we complete verification before processing federal financial aid. If there are differences between the information submitted and your Free Application for Federal Student Aid (FAFSA) the school will make the necessary changes. Incomplete worksheets and documentation will cause delays in processing your financial aid. No determination of aid eligibility can be made until all documents are received and reviewed.

### A. Student Information

\_\_\_\_\_ @ \_\_\_\_\_  
 Last Name      First Name      M.I.      Banner (ID) Number

\_\_\_\_\_      \_\_\_\_\_  
 Phone Number (include area code)      NMHU Email Address

### B. Family Information

Number of Household Members: List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2020, through June 30, 2021, or if the other children would be required to provide parental information if they were completing a FAFSA for 2020–2021. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents 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, 2021.

Number in College: Include in the space below information about any household member, excluding the parents, who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2020, and June 30, 2021, and include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	College/University	Enrolled at Least Half Time (Yes or No)
		<i>Self</i>	New Mexico Highlands University	

**Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.**

### PARENT(S) 2018 INCOME INFORMATION

*The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.*

**I am a TAX FILER**

**Instructions:** Complete this section if the parents filed or will file a 2018 IRS income tax return(s). *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](http://FAFSA.gov).* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

- The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules.**

**A 2018 IRS Tax Return Transcript may be obtained through:**

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the 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.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form

**I am NOT A TAX FILER**

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2018 income tax return with the IRS. Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2019 that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority.

**Check the box that applies:**

- Neither parent was employed, and neither had income earned from work in 2018, and will provide confirmation of nonfiling.
- One or both parents were employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form and will provide confirmation of nonfiling.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W2 or an Equivalent Document Provided by Employer?	2018 Income
		\$
		\$
		\$
Total Income Earned from Work		\$

Student's Name: \_\_\_\_\_ NMHU I.D. # @ \_\_\_\_\_

**STUDENT 2018 INCOME INFORMATION**

*The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018*

**I am a TAX FILER**

**Instructions:** Complete this section if the student and spouse filed or will file a 2018 IRS income tax return(s). *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](http://FAFSA.gov).* In most cases, no further documentation is needed to verify 2018 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

**Check one box that applies:**

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2018 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules.**

**A 2018 IRS Tax Return Transcript may be obtained through:**

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the 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.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

**I am NOT A TAX FILER**

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2018 income tax return with the IRS.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2018.
- The student was employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 IRS W-2 forms issued to the student]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W2 or an Equivalent Document Provided by Employer ?	2018 Income
		\$
		\$
		\$
Total Income Earned from Work		\$

Student's Name: \_\_\_\_\_ NMHU I.D. # @ \_\_\_\_\_

### **C. High School Completion Status**

Provide one of the following documents to indicate the student's high school completion status when the student begins college in 2020–2021:

- A copy of the student's high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

**(continue on next page)**

Student's Name: \_\_\_\_\_ NMHU I.D. # @ \_\_\_\_\_

**IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE**  
**(To Be Signed at the Institution)**

The student must appear in person at New Mexico Highlands University 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.**

*New Mexico Highlands University 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.

**Identity and Statement of Educational Purpose**  
**(To Be Signed in the Presence of a Notary when unable to be signed at Institution)**

If the student is unable to appear in person at New Mexico Highlands University 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.

<h3>Statement of Educational Purpose</h3>	
I certify that I _____ am the individual signing	
(Print Student's Name)	
this 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 _____ for 2020–2021.	
(Name of Postsecondary Educational Institution)	
_____	_____
(Student's Signature)	(Date)
_____	
(Student's ID Number)	

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_ City/County of \_\_\_\_\_ On \_\_\_\_\_, before me,

\_\_\_\_\_

(Notary name)

personally appeared, \_\_\_\_\_, and proved to me

(Printed name of signer)

on the basis of satisfactory evidence of identification \_\_\_\_\_

(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal** \_\_\_\_\_ (Notary signature)

My commission expires on \_\_\_\_\_

Student's Name: \_\_\_\_\_ NMHU I.D. # @ \_\_\_\_\_

**D. CERTIFICATIONS AND SIGNATURES**

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

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.

\_\_\_\_\_  
Print Student's Name

@ \_\_\_\_\_  
Student's Banner ID Number

\_\_\_\_\_  
Student's Signature (Original Signature Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (Original Signature Required)

\_\_\_\_\_  
Date