**Morningside University**

**Office of Student Financial Planning**

**V5 Custom Verification Form 2023-2024**

 **Dependent Student**

Lewis Hall, Room 203

1501 Morningside Avenue

Sioux City, IA 51106

Phone: 712-274-5159

Fax: 712-274-5605

Email: finaid@morningside.edu

**Student Information**

Name (First, Middle Initial, & Last) Morningside ID# Email

Permanent Address Birthdate Mobile Phone Number

City, State, Zip Home Phone Number

**Student Tax Forms and Income Information**

|  |  |  |
| --- | --- | --- |
| Check:  | If you: | You must: |
| ☐ | have used the IRS Data Retrieval Tool to transfer **2021** tax return information to the 2023-2024 FAFSA.  | Complete this Verification Worksheet and return it to our office. (You DO NOT NEED to provide a copy of your IRS Tax Return or Transcript at this time unless your 2023-2024 FAFSA has a 400 or 401 Comment Code.)  |
| ☐ | have not yet used, but will use the IRS Data Retrieval Tool to transfer **2021** tax return information to the 2023-2024 FAFSA.  | Complete this Verification Worksheet and return it to our office. (You DO NOT NEED to provide a copy of your IRS Tax Return or Transcript at this time unless your 2023-2024 FAFSA has a 400 or 401 Comment Code.)  |
| ☐ | are unable or choose not to use the IRS Data Retrieval Tool but will provide a signed **2021** Tax Return OR **2021** IRS Tax Return Transcript. | Attach a **signed** copy of your **2021** Tax Return, Schedules 1, 2, & 3 or **2021** Tax Return Transcript.  |
| **\*\*Tax Return must be signed by filer or tax preparer\*\*** |
| Instructions for ordering an IRS Tax Return Transcript listed on page 5.  |
| ☐ | filed a FOREIGN TAX RETURN or had foreign income in **2021.** | Provide an English translation of the foreign financial aid document. If you filed a Puerto Rico tax return, provide a signed copy of the 2021 Puerto Rico Forma Unica tax return (does not need to be translated).  |
| ☐ | WORKED, but are NOT REQUIRED to file a **2021** Federal Tax Return.  | **2021** W-2 Issued? | Employer Name | **2021** Amount Earned |
|  Yes No |   | $ |
|  Yes No |   | $ |
|  Yes No |   | $ |
|  Yes No |   | $ |
| \*\*attach a copy of all your **2021** W-2 and 1099 Tax Forms and return them to our office with this verification worksheet.  |
| ☐ | DID NOT work and NOT REQUIRED TO FILE a **2021** Federal Tax Return. | Complete this Verification Worksheet and return it to our office.  |
| **Exception: Amended Tax Filers:** If you filed an amended **2021** Federal Tax Return and were unable to use the IRS Data Retrieval Tool, you must submit a signed copy of your **2021** Tax Return or Tax Return Transcript as well as a signedcopy of your amended Federal Tax Return (IRS Form 1040-X).  |

**Parent Information**

Only list the custodial parent(s) who you lived with more than 50% of the time in the past year. These individuals should also be listed as the parent(s) on the 2023-2024 FAFSA”

Parent 1 Name (First, Middle Initial, & Last) Parent 2 Name (First, Middle Initial, & Last)

Check the box that applies for Parent 1: Check the box that applies for Parent 2:

 ☐Mother ☐Step-Mother ☐Mother ☐Step-Mother

 ☐Father ☐Step-Father ☐Father ☐Step-Father

Marital status of your parent(s) listed above:

 ☐Married/Remarried as of:\_\_\_\_\_\_\_\_\_\_\_\_ ☐Divorced or Separated as of:\_\_\_\_\_\_\_\_\_\_\_\_ ☐Widowed as of:\_\_\_\_\_\_\_\_\_\_\_\_

 ☐Never Married ☐Unmarried but living together

**Family and Household Information**

List individuals who are considered part of your legal parent(s) household. Individuals can include:

* Student(s) attending Morningside University.
* Legal parent(s)/step-parent(s) listed above.
* Legal parent’s/step-parent’s other children (even if they don’t live with your parents) if (a)parents provide more than 50% of their support from July 1, 2023 to June 30, 2024 OR (b) not supporting 50%, but child would be required to provide parental information if they completed the 2023-2024 FAFSA.
* Other people if they live with your parent(s) and your parent(s) will provide more than 50% of their support and your parents will continue to provide more than 50% of their support between July 1, 2023 to June 30, 2024.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Full Name | Relationship | Age | Birthdate MM/DD/YYYY | Name of College (If enrolled) | 2023-2024 College Enrollment |
|   | Student |   |   | Morningside | ☐ Full-Time |
|   |   |   |   |   University | ☐ Half-Time |
|   | ☐ Parent ☐ Step-Parent |   |   |   | ☐ Full-Time |
|   | ☐ Sister ☐ Brother |   |   |   | ☐ Half-Time |
|   | ☐ Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |   |   |   |   |
|   | ☐ Parent ☐ Step-Parent |   |   |   | ☐ Full-Time |
|   | ☐ Sister ☐ Brother |   |   |   | ☐ Half-Time |
|   | ☐ Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |   |   |   |   |
|   | ☐ Parent ☐ Step-Parent |   |   |   | ☐ Full-Time |
|   | ☐ Sister ☐ Brother |   |   |   | ☐ Half-Time |
|   | ☐ Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |   |   |   |   |
|   | ☐ Parent ☐ Step-Parent |   |   |   | ☐ Full-Time |
|   | ☐ Sister ☐ Brother |   |   |   | ☐ Half-Time |
|   | ☐ Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |   |   |   |   |
|   | ☐ Parent ☐ Step-Parent |   |   |   | ☐ Full-Time |
|   | ☐ Sister ☐ Brother |   |   |   | ☐ Half-Time |
|   | ☐ Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |   |   |   |   |
|   | ☐ Parent ☐ Step-Parent |   |   |   | ☐ Full-Time |
|   | ☐ Sister ☐ Brother |   |   |   | ☐ Half-Time |
|   | ☐ Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |   |   |   |   |

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

**Parent Tax Forms and Income Information**

|  |  |  |
| --- | --- | --- |
| Check:  | If you: | You must: |
| ☐ | have used the IRS Data Retrieval Tool to transfer **2021** tax return information to the 2023-2024 FAFSA.  | Complete this Verification Worksheet and return it to our office. (You DO NOT NEED to provide a copy of your IRS Tax Return or Transcript at this time unless your 2023-2024 FAFSA has a 400 or 401 Comment Code.)  |
| ☐ | are unable or choose not to use the IRS Data Retrieval Tool but will provide a signed **2021** Tax Return OR **2021** IRS Tax Return Transcript. | Attach a **signed** copy of your **2021** Tax Return, Schedules 1, 2, & 3 or **2021** Tax Return Transcript.  |
| **\*\*Tax Return must be signed by filer or tax preparer\*\*** |
| Instructions for ordering an IRS Tax Return Transcript listed on page 5.  |
| ☐ | filed a FOREIGN TAX RETURN or had foreign income in **2021.** | Provide an English translation of the foreign financial aid document. If you filed a Puerto Rico tax return, provide a signed copy of the 2021 Puerto Rico Forma Unica tax return (does not need to be translated).  |
| ☐ | WORKED, but are NOT REQUIRED to file a **2021** Federal Tax Return. | 1. Parent(s) must provide copies of all 2021 W-2s and 1099s.
 |
| 1. Parent(s) must request an IRS Proof of Non-Filing Letter from IRS. Instructions listed on page 5 of this document.
 |
| ☐ | DID NOT work and NOT REQUIRED TO FILE a **2021** Federal Tax Return. | 1. List your source(s) of income in 2021 (i.e. Disability, Pension, etc.)

|  |  |
| --- | --- |
| Source | 2021 Amount Earned |
|  |  |
|  |  |
|  |  |
|  |  |

 |
| 1. Parent(s) must request an IRS Proof of Non-Filing Letter from IRS. Instructions listed on page 5 of this document.
 |
| **Exception: Amended Tax Filers:** If you filed an amended **2021** Federal Tax Return and were unable to use the IRS Data Retrieval Tool, you must submit a signed copy of your **2021** Tax Return or Tax Return Transcript as well as a signedcopy of your amended Federal Tax Return (IRS Form 1040-X). |

**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 2023–2024:

* 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.

**Identity and Statement of Educational Purpose**

**(To Be Signed at Morningside University)**

The student must appear in person at Morningside 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. 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.

**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 Morningside University to verify his or her identity, the student must provide to the institution:

1. 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
2. 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.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Printed Student’s Name) am the individual signing thisStatement of Educational purpose that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Morningside University for 2023–2024.

Student’s Signature ID Number Date

**Person receiving documentation at Morningside University:**

 Signature Date

**OR Notary’s Certificate of Acknowledgement:**

State of City/County of

On (Date), before me, (Notary’s Name), personally appeared, (Printed name of signer), and proved to me because of satisfactory evidence of identification (Type of unexpired government issued phono ID provided) to the above named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

 (seal) (Notary Signature)

My commission expires on (Date)

**Certifications and Signatures**

* By signing this worksheet, I certify that all information reported is complete and correct.
* I am also granting the Office of Student Financial Planning permission to update the FAFSA through Federal Student Aid online correction tool to match the values found on this and other verification documents I have or will provide.

**WARNING:** I understand if I purposely give false or misleading information on this worksheet, I may be fined up to $20,000, sent to prison, or both.

Print Student’s Name Student’s ID Number

Student’s Signature (Required) Date

Parent’s Signature (Required) Date

**Requesting Tax Return Transcript or Verification of Non-Filing**

1. **Request Online:**
	* Go to irs.gov
	* Click on “Get Your Tax Record”
	* Select “Get Transcript Online” and then select “Create Account” unless you have an account with the IRS, then enter your Username, then select “Log In”
	* To make an account, you must have a Social Security Number, date of birth, filing status, mailing address from your latest tax return, and access to your email account.
	* In order to authenticate your identity you must have a credit card number or an account number from an auto loan, mortgage, home equity loan or line of credit (only for authentication purposes, you will not be charged)
	* Have your mobile phone ready (must be a phone whose account is in your name)
	* Follow the prompts to set up your User Profile
	* Indicate “Higher Education/Student Aid” when asked to “Select a reason you need a transcript”
	* Select the appropriate “Return Transcript”
	* An electronic PDF of the return transcript will now be displayed and can also be downloaded
2. **Request by Mail:**
	* Go to irs.gov
	* Click on “Get Your Tax Record”
	* Select “Get Transcript by Mail”
	* Enter the primary tax filer’s Social Security Number, date of birth, street address, and zip or postal code. The IRS will only allow you to use the address currently on file with IRS. Generally, this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the IRS 8822 Form, the IRS may have the updated address of file. If the address change has not been complete, please fill out a 4506-T Form. Instructions listed below.
	* Click ”Continue”
	* In the **Type of Transcript** field, select “Return Transcript”
	* In the **Tax Year** field, select the appropriate tax year (2021)
	* If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript within 5 to 10 business days from the time the online request was completed.
3. **Order Tax Transcript By Phone:**
	* Call the IRS at 1-800-908-9946
	* Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally, this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the IRS 8822 Form, the IRS may have the updated address on file. If address change has not been complete, please fill out a 4506-T Form. Instructions listed below.
	* Select “Option 2” to request an IRS Tax Return Transcript
	* Enter the appropriate tax year (2021)
	* If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 business days from the time the order was placed.
4. **Verification of Non-Filing or Address Change**
	* You will be filing out a 4506T Form
		1. Go to irs.gov
		2. Select “Forms and Instructions”
		3. Select Form “**4506-T**”
		4. Fill out this form: #6 Enter 1040; Check Boxes #6a., #7, & #8; #9 Enter 12/31/2021
		5. Mail or Fax it to the appropriate address (listed on page 2 of the form).
5. **Unacceptable Forms: IRS Tax Account Transcript and IRS Tax Summary**