



UMA Office of Financial Aid  
 41 University Drive  
 Augusta, ME 04330  
 207-621-3412 or 877-862-1234 (T)  
 207-621-3384(F) or 800-316-3600 (TTY)  
 umafa@maine.edu

## 2023-2024 Independent Verification Worksheet

Your Free Application for Federal Student Aid (FAFSA) was selected by the U.S. Department of Education for a review process called “verification.” Through this process, we will be comparing information from your FAFSA with copies of your (and your spouse’s) 2021 IRS tax return transcript, with W-2 forms, or other financial documents. The law states we have the right to ask for this information before awarding Federal Aid. You must complete this form and return it to the Office of Financial Aid as soon as possible. You will **not** receive an award or a disbursement of financial aid until this process is complete.

**PART 1: STUDENT**

Student’s Name \_\_\_\_\_ Student ID# \_\_\_\_\_

Address \_\_\_\_\_ Date of Birth \_\_\_\_\_

City/Town \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Daytime Phone \_\_\_\_\_

**PART 2: FAMILY (HOUSEHOLD SIZE)**

**Please list below the number of people in the student’s household. Include:**

- **You and your spouse** if you are married
- **Your and your spouse’s children** if the student or spouse will provide more than half of the children’s support from July 1, 2023 through June 30, 2024, even if the child does not live with the student.
- **Other people**, if they now live with the student and/or spouse provides 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, 2024

**Include in the space below information about any household member who is, or will be, enrolled at least halftime in a degree, diploma or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024, and include the name of the college.**

Full Name	Age	Relationship	*Will this person be attending college at least ½-time during the 2023-2024 school year?	Name of College this person will be attending during the 2023-2024 school year *This person must be admitted to a degree or certificate program
		<b>Student</b>	<input type="checkbox"/> yes <input type="checkbox"/> no	
		<b>Spouse</b>	XXXXXXXX	XXXXXXXXXXXXXXXXXXXXXXX
			<input type="checkbox"/> yes <input type="checkbox"/> no	
			<input type="checkbox"/> yes <input type="checkbox"/> no	

(If necessary, attach an additional sheet)

### PART 3: INCOME STUDENT AND SPOUSE

You and your spouse are required to submit income information. **For faster processing, login to [www.fafsa.gov](http://www.fafsa.gov) and use the IRS Data Retrieval tool to make corrections to your FAFSA if you did not use the data retrieval tool on the initial FAFSA.** IRS Data Retrieval allows you to obtain your income information directly from the IRS. **DO NOT** change this information once it has been retrieved electronically. If you filed an amended tax return or are married, filing separately, you are not eligible for IRS Data Retrieval and must submit a **tax return transcript**. You may request a copy of your **tax return transcript** at [www.irs.gov](http://www.irs.gov) or by calling (800)908-9946.

Please select one of the following regarding **STUDENT** income earned in **2021**:

- I (the **student**) filed a 2021 Federal Income Tax Return AND used IRS Data Retrieval Tool to correct my FAFSA data.
- I (the **student**) am not eligible for IRS Data Retrieval and will submit a transcript obtained directly from the IRS.
- I filed an amended tax return and will submit a signed copy of my 1040X and a tax return/transcript.
- I (the **student**) worked during 2021 and I am not required to file a 2021 Federal Tax Return (Attach copies of all W-2 forms).

Student's Employer(s)	Total Income(s)
	\$
	\$

- I (the **student**) did not earn any income during 2021.

Please select one of the following regarding **SPOUSE** income earned during 2021:

- My **spouse** filed a 2021 Federal Tax Return AND used IRS Data Retrieval Tool to correct my FAFSA data.
- My **spouse** is not eligible for IRS Data Retrieval and will submit signed tax return/transcript(s) obtained directly from the IRS because:  My **spouse and I** are married, filing separately  Other, please explain: \_\_\_\_\_
- My **spouse** filed an amended tax return and will submit a signed copy of 1040X and a tax return/transcript.
- My **spouse** worked during 2021 but did not and was not required to file a 2021 Federal Tax Return. Please list employers and wages earned. (Attach copies of all W-2 forms).

Your Spouse' Employer(s)	Total Income(s)
	\$
	\$
	\$

- My **spouse** did not earn any income during 2021 and was not required to file a 2021 Federal Tax Return. **\*NEW\*** You must provide documentation directly from the IRS that indicates a 2021 Income Tax Return was not filed with the IRS. Request a "Non-tax Filing Letter" directly from the IRS by submitting form 4506-T. You can obtain this form at [www.irs.gov](http://www.irs.gov) or from the Office of Financial Aid.

### PART 4: CERTIFICATION AND SIGNATURE

By signing this form, I (we) certify that all of the information reported to qualify for student financial aid is complete and correct. **WARNING:** If I (we) purposely give false or misleading information on this form, I (we) may be fined, sentenced to jail, or both. This form requires a **handwritten** signature by each signer.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date