

## 2020–2021 CA DREAM Verification Worksheet Dependent Student

**Deadline: Friday, June 18th, 2021**

Your 2020–2021 California Dream Act Application was selected for review in a process called verification. The law says that before awarding any State Aid, we may ask you to confirm the information you and your parents reported on your Dream Application. To verify that you provided correct information the financial aid administrator at your school will compare your Dream application with the information on this worksheet and with any other required documents. If there are differences, your application information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

### A. Dependent Student's Information

|   |                      |                |  |
|---|----------------------|----------------|--|
| Student's Last Name                             | Student's First Name | Student's M.I. | Student's Social Security Number         |
| Student's Street Address (include apt. no.)     |                      |                | Student's Date of Birth                  |
| City  | State                | Zip Code       | Student's Email Address                  |
| Student's Home Phone Number (include area code) |                      |                | Student's Alternate or Cell Phone Number |

### B. Dependent Student's Family Information

List below the people in your parent(s) household. Include:

- **Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).**
- Your parent(s)' other children if your parent(s) will provide more than half of their 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 they do not live with your parent(s).**
- Other people if they now live with your parent(s) and **your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2021.**

**Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2020, and June 30, 2021.**

*If more space is needed, attach a separate page with the student's name and Student ID Number at the top.*

| Full Name          | Age       | Relationship | College                 | Will be Enrolled at Least Half Time |
|--------------------|-----------|--------------|-------------------------|-------------------------------------|
| <i>Justin Bass</i> | <i>29</i> | <i>Self</i>  | <i>College of Marin</i> | <i>(Yes or No)</i>                  |
|                    |           |              |                         |                                     |
|                    |           |              |                         |                                     |
|                    |           |              |                         |                                     |
|                    |           |              |                         |                                     |
|                    |           |              |                         |                                     |
|                    |           |              |                         |                                     |

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

**C. Dependent Student's Income Information to Be Verified**

1. **TAX RETURN FILERS—Important Note:** 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.

**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. 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 student has used the IRS DRT in FAFSA on the Web to transfer their 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 school 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), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "**IRS Tax Return Transcript**" and **NOT** the "IRS Tax 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.

If the student and spouse filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules must be provided for each. Check here if a 2018 IRS Tax Return Transcript is provided

- Check here if a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules is provided.
- Check here if a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules will be provided later.

2. **TAX RETURN NONFILERS**— Complete this section AND must provide form **4506-T** from the IRS if the student **will not file and is not required to file a 2018** income tax return. Tax Form 4506-T can be obtained at: <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>

**Check the box that applies:**

- The student was not employed, had no income earned from work in 2018 and is providing **Form 4506-T and Income Certification**
- The student and/or spouse 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]. 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                         | W-2 & IRS Form 4506-T Provided? | Annual Amount Earned in 2018 |
|---|---------------------------------|------------------------------|
| <i>(Example) ABC's Auto Body Shop</i>   | <i>Yes</i>                      | <i>\$4,500.00</i>            |
|   |                                 |                              |
|   |                                 |                              |
|   |                                 |                              |
| Total Amount of Income Earned From Work |                                 | \$                           |

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, or a signed statement certifying that the individual attempted to obtain confirmation of nonfiling from the IRS or other relevant tax authority and was unable to obtain the required documentation.

- \_\_\_ Check here if confirmation of nonfiling or a signed statement is provided.
- \_\_\_ Check here if confirmation of nonfiling or a signed statement will be provided later.

**D. Parent's Income Information to Be Verified-**

**1. TAX RETURN FILERS—Important Note:** 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.

**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. 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), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "**IRS Tax Return Transcript**" and **NOT** the "IRS Tax 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.

If the parents filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and the 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules must be provided for each. Check here if a 2018 IRS Tax Return Transcript is provided

- Check here if a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules is provided.
- Check here if a 2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules will be provided later.

**2. TAX RETURN NONFILERS**— 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.

**Check the box that applies:**

- Neither parent was employed and neither had income earned from work in 2018. Provide IRS **Form 4506-T and Income Certification**
- 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.

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

| Employer's Name                         | IRS W-2 & IRS Form 4506-T Provided? | Annual Amount Earned in 2018 |
|---|-------------------------------------|------------------------------|
| <i>(Example) ABC's Auto Body Shop</i>   | <i>Yes</i>                          | <i>\$4,500.00</i>            |
|   |                                     |                              |
|   |                                     |                              |
| Total Amount of Income Earned From Work |                                     | \$                           |

**E. Certification and Signatures**

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.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

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

\_\_\_\_\_   
 Student's ID Number

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

\_\_\_\_\_   
 Date

\_\_\_\_\_   
 Parent's Signature

\_\_\_\_\_   
 Date

**Submit this worksheet in person or by mail to:**

**College of Marin  
Enrollment Services Office  
835 College Avenue  
Kentfield, CA 94904**