

2023-2024 V5 Verification Worksheet

Your Free Application for Federal Aid (FAFSA) was selected for review in a process called verification. Before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA. We will compare your FAFSA with the information you report on this and any other required documentation. If there are differences, your FAFSA information may need to be corrected. You and the parent whose information was reported on the FAFSA must complete and sign this worksheet and submit it to our office to avoid any delay in processing your request for financial aid. Contact our office if you have any questions regarding this form at 510.879.9200. Submit this completed form with any required documents to the Financial Aid Office by email to: finaid@samuelmerritt.edu.

A. Student Name : (please print)

Last Name	First Name	Middle Initial
Address	City, State	ZIP
Student ID#	Date of Birth	Phone Number

B: FAMILY INFORMATION:

An **Independent student** will be able to state at least one of the following to be true. Proof may be requested.

- You were born before January 1, 1999.
- You are admitted to a masters or doctoral degree granting program.
- You were married, as of the day you filed the Free Application for Federal Student Aid.
- You have children for whom you will provide more than half of their support from July 1, 2022 through June 30, 2023.
- You have dependents (other than your children or spouse) who live with you and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.
- You are or were, at any time since you turned age 13, a ward/dependent of the court or in foster care.
- You are or were an emancipated minor as determined by a court in your state of legal residence.
- You are or were in legal guardianship as determined by a court in your state of legal residence.
- You are a veteran of or currently serving on active duty (for purposes other than training) in the U.S. Armed Forces.
- You were on or after July 1, 2021, determined by a school or shelter official to be an unaccompanied youth who is homeless or self-supporting and at risk of being homeless.
- Both of your parents were deceased at any time since you turned 13.

Check a box based on the definition of an independent student as defined above and complete the grid below.

DEPENDENT STUDENT:

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

- Yourself
- Your custodial parent(s) (include step-parent)
- Your custodial parent(s)' dependent children, even if the child does not live with your parents
- Other people only if they now live with your parents, and your parents provided more than half of their support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.

INDEPENDENT STUDENT:

List the people in your household. Include:

- Yourself
- Your spouse, if married
- Your dependent children, if you will provide more than half of their support from July 1, 2022 through June 30, 2023, even if the child does not live with you.
- Other people if they now live with you, and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.

B. Family Information (Continued)

List the people living in your parent(s) household, including:

- Yourself;
- your parent(s) (including a stepparent) even if you don't live with your parent(s)
- Other children that your parent(s) provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024 (even if they do not live with your parent(s)).
- Other people living in your parent(s) household and your parent(s) provide more than half of their support.

Name	Age	Relationship	College	Enrolled Half-Time

B. Student and/or Spouse (if married) Tax Information:

___ Check here if you have used the IRS Data Retrieval tool and the information is unchanged.

___ Check here if you are attaching a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules.

___ Check here if you will not file and are not required to file a 2021 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at http://www.samuelmerritt.edu/financial_aid/forms

C. Parent(s) Tax Information: (required of Dependent students only)

___ Check here if you have used the IRS Data Retrieval tool and the information is unchanged.

___ Check here if you are attaching a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules.

___ Check here if you will not file and are not required to file a 2021 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at http://www.samuelmerritt.edu/financial_aid/forms

Signatures:

Each person signing this form certifies that all the information reported on is complete and correct. The student and one parent must sign and date the form.

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

Student

Date

Parent (of Dependent students only) Date

D. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE

The student must appear in person at Samuel Merritt 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 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 at the Institution)**

I certify that I, _____, am the individual signing 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 Samuel Merritt University for 2023-2024.

Student’s Signature

Date

Student’s ID Number

Financial Aid Administrator (Print Name)

Financial Aid Administrator Signature

Date

D. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (Continued)

**IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE
(To Be Signed in the Presence of Notary)**

If the student is unable to appear in person at Samuel Merritt 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.

