

# How to Provide Tax Information to the Office of Financial Aid

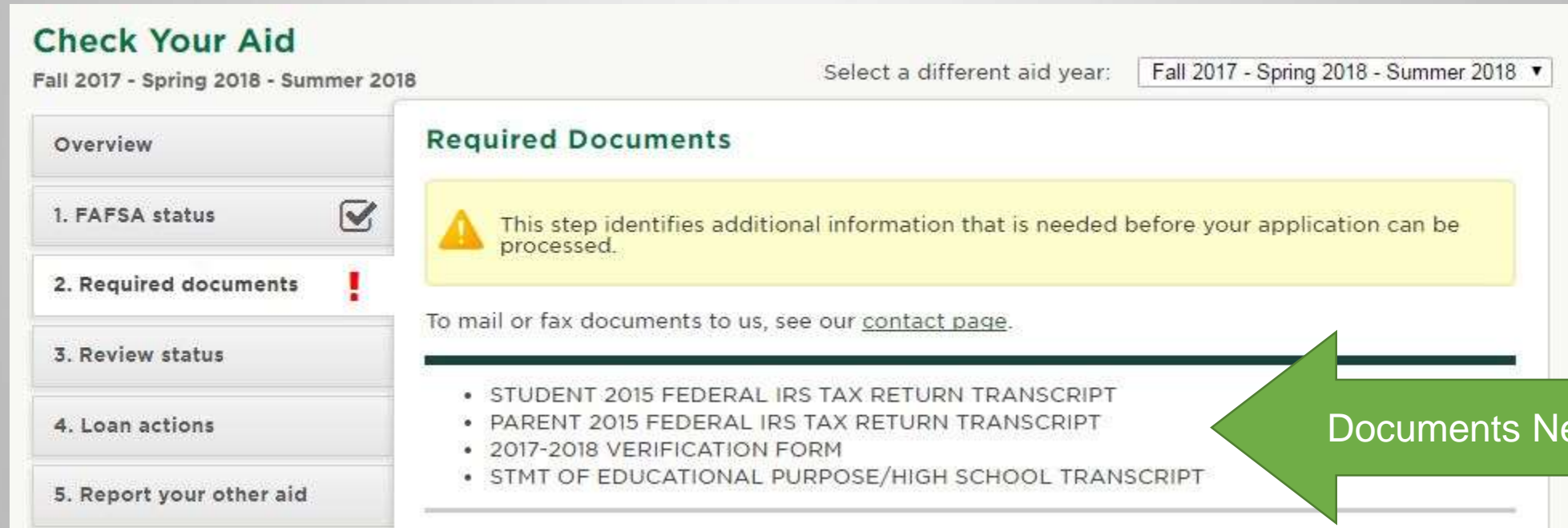
(Also known as “Verification”)



Begin

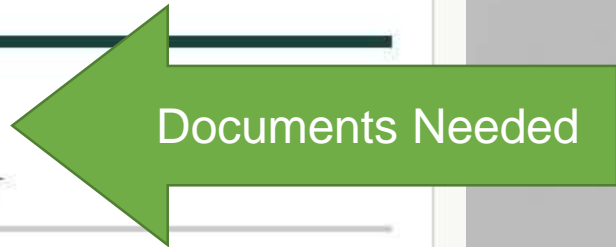
# What documents are needed?

Begin by going to [stuinfo.msu.edu](http://stuinfo.msu.edu), click on Financial Aid (Check Your Aid) and go to the “Required Documents” tab to see what documents are needed. The next slides will assist you in gathering the correct information.



The screenshot shows the 'Check Your Aid' interface for the 'Fall 2017 - Spring 2018 - Summer 2018' aid year. A sidebar on the left lists five steps: Overview, 1. FAFSA status (checked), 2. Required documents (highlighted with a red exclamation mark), 3. Review status, 4. Loan actions, and 5. Report your other aid. The main content area is titled 'Required Documents' and features a yellow warning box stating: 'This step identifies additional information that is needed before your application can be processed.' Below this, a link points to the 'contact page' for mailing or faxing documents. A list of required documents is provided:

- STUDENT 2015 FEDERAL IRS TAX RETURN TRANSCRIPT
- PARENT 2015 FEDERAL IRS TAX RETURN TRANSCRIPT
- 2017-2018 VERIFICATION FORM
- STMT OF EDUCATIONAL PURPOSE/HIGH SCHOOL TRANSCRIPT



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Did you complete a tax return  
in 2015?

Yes

No



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Did you work in 2015?

Yes

No



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# W-2s

Gather your W-2s from any place that you worked in 2015. Make a copy. You will need to send these to the Office of Financial Aid along with your other paperwork.



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# Verification of Non-Filing

**Option 1:** Check the box that indicates you did not file a tax return, but had some earnings in 2015.

**Non-Tax Filer with Earnings in 2015** - By checking this box you confirm you (the student) did not complete a tax return in 2015. Complete the chart below listing all employers and total earnings.

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2015
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
<b>Total Amount of Income Earned From Work</b>		\$



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# Verification of Non-Filing

**Option 1:** Check the box that indicates you did not file a tax return and had no earnings in 2015.

**Non-Tax Filer with No Earnings in 2015.** By checking this box you confirm you (the student) did not complete a tax return for 2015 and had no earnings in 2015.



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# Verification of Non-Filing

**Option 2:** You may verify that you did not complete a tax return by sending in a Verification of Non-Filing Letter from the IRS. You can order the letter:

- Online: <https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them>
- Phone: 1-800-908-9946
- By mail – send in a Form 4506-T, Request for Tax Return as instructed on the form (select “Verification of Non-Filing Letter”)



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# A Signed Copy of 2015 1040 Tax Return

## **Option 1:** Provide a Signed Copy of Your 2015 1040 Tax Return

- A valid signature must exist on the 1040.
- An electronic signature from a tax filing firm is not acceptable for financial aid purposes.



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# 2015 Tax Transcript

## **Option 2:** Order a 2015 Tax Transcript

Important Note! – Only request Tax Return Transcript (not Tax Account Transcript – we cannot accept the account transcript)

You can order a Tax Transcript:

- Online at <https://www.irs.gov/individuals/get-transcript>
- By Mail – Send in Form 4506-T, Request for Transcript of Tax Return
- By Phone – Call 1-800-908-9946

For more information visit: <https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them>



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You're done with your tax information!  
Next you will need to complete a  
Verification Form.



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# Verification Form

- The Verification Form is available by clicking the verification form links under Required Documents in StuInfo or on our website at [finaid.msu.edu/forms.asp](https://finaid.msu.edu/forms.asp).
- Tip: Not sure if you select Dependent Student Verification Form or Independent Student Verification Form? If parent information is required on the FAFSA then select the Dependent Student Verification Form.



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# Verification Form

- On the first page of the Verification Form be sure to include your (student) PID and list all the people who are a part of your household including whether they are in college.
- Please read the instructions of who should be included carefully – not including someone in this list can impact your financial aid eligibility.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>MSU Student</i>		

**Note:** We may request additional documentation to verify college enrollment for other family members.



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# Verification Form

- On the Verification Form the next pages go over your options to submit tax information (which we already covered in previous slides).
- Make sure to sign and date your verification form.
- If it is not signed and dated it will be returned and delay your financial aid.

**Certification and Signature**  
Each person signing below certifies that all of the information reported is complete and correct.

_____	_____
Student's Signature	Date
_____	_____
Parent's Signature	Date

All correspondence and forms submitted to the Office of Financial Aid should include your name, PID and local address. **Failure to submit the requested information may prevent processing of your financial aid or cause the billing back of aid already received.**



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# In StuInfo under Required Documents was the Statement of Educational Purpose/High School Transcript requested?


**Check Your Aid**  
Fall 2017 - Spring 2018 - Summer 2018

Select a different aid year: Fall 2017 - Spring 2018 - Summer 2018 ▾

**Overview**


- 1. FAFSA status
- 2. Required documents** !
- 3. Review status
- 4. Loan actions
- 5. Report your other aid

**Required Documents**

 This step identifies additional information that is needed before your application can be processed.

To mail or fax documents to us, see our [contact page](#).

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- STUDENT 2015 FEDERAL IRS TAX RETURN TRANSCRIPT
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- 2017-2018 VERIFICATION FORM
- STMT OF EDUCATIONAL PURPOSE/HIGH SCHOOL TRANSCRIPT 

Yes

No

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# Statement of Educational Purpose/High School Transcript

- You can find this form either by clicking the link in [StuInfo](#) or at [finaid.msu.edu/forms.asp](http://finaid.msu.edu/forms.asp).
- First complete the Student Information section.

**MICHIGAN STATE**  
UNIVERSITY

2017-2018 High School Completion  
And Identity Verification Form

Your FAFSA application was selected by the Department of Education for a review process called verification. During this review, Michigan State will compare information submitted on the FAFSA to information on this worksheet and other required documentation. Federal regulations require that we complete verification before processing federal financial aid.

**A. Student Information:**

Student Name: \_\_\_\_\_ PID: \_\_\_\_\_

Permanent Address: \_\_\_\_\_

Student Email: \_\_\_\_\_ Student Phone: \_\_\_\_\_



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# Statement of Educational Purpose/High School Transcript

- Next you will need to submit documentation proving that you completed high school.
- Options include:
  - A copy of your high school diploma.
  - A copy of your final official high school transcript that shows the date when the diploma was awarded.
  - A copy of your General Education Development (GED) certificate or GED transcript.
  - An academic transcript that indicates you successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
  - A homeschool diploma or a transcript (signed by parent/guardian) that lists the secondary school courses you completed and documents the successful completion of a secondary school education in a homeschool setting. Please note: If you were homeschooled in another state, you must submit the secondary completion credential for homeschool required by your state (if your state law differs from the above requirements).



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# Statement of Educational Purpose/High School Transcript

- Finally you will need to come into the Office of Financial Aid to complete the next section.
- The Identity and Statement of Educational Purpose section is required to make sure that your identity is not stolen and you are the person requesting financial aid.

**C. Identity and Statement of Educational Purpose:**

You, the student, must appear in person at Michigan State University Office of Financial Aid to verify your identity by presenting a 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 the name of the institution authorized to collect the student's ID.

**In addition, the student must sign, in the presence of the institution official, the following:**

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement  
(Print Student's Name)  
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 Michigan State University for 2017-2018.

\_\_\_\_\_  
(Student's Signature)                      (PID)                      (Date)

\_\_\_\_\_  
(Financial Aid Advisor's Signature)                      (Date)



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# You're Done!

- Congratulations! We know this isn't an easy process. Once we receive all documents we review them on a first come, first serve basis.
- You can monitor the status under the "Review Status" tab in StuInfo within Financial Aid (Check Your Aid).



Start Over