

This cover page includes instructions about where and how to turn in your form. If you are submitting a form that contains personally identifiable information (i.e. name, student ID number, date of birth), we encourage you to **submit the completed form online, by mail, or in person.**

**ONLINE TO:**

[z.umn.edu/FA-upload](https://z.umn.edu/FA-upload)

**BY MAIL TO:**

UMD Office of Financial Aid & Scholarships  
1049 University Drive  
Duluth MN 55812-3011

**IN PERSON ON CAMPUS TO:**

**One Stop Student Services**

23 Solon Campus Center

If you choose to submit the completed form by email, for your security we prefer to receive this form via your **UMD email address (xxxxxxx@d.umn.edu).**

To learn more about what might be personally identifiable information, visit [studentprivacy.ed.gov](https://studentprivacy.ed.gov).

**No need to print this cover page.**

**INDEPENDENT STUDENT VERIFICATION**

**PLEASE read instructions carefully, complete both pages, and sign this form on page 2.**

Your financial aid application was selected for a process called “verification.” We can resume processing your application when this form and all required documentation have been submitted.

To be considered for financial aid the documentation must be submitted by your last date of eligible enrollment, or the date listed below that corresponds with your last term of enrollment, whichever is first:

**Fall term 2023:**  
December 1, 2023

**Spring term 2024:**  
April 20, 2024

**May/Summer 2024:**  
July 12, 2024

In the verification process we compare the information you provide on this form and your **2021** tax return data to the information provided on your Free Application for Federal Student Aid (FAFSA). If the information on your FAFSA differs from the information on your financial documents, your application data will be corrected. Your financial aid award amounts will reflect those changes.

**Please be sure to write your (the student’s) name and University ID number on all tax documents submitted.**

**RETURN FORM:**

**ONLINE TO:** [z.umn.edu/FA-upload](https://z.umn.edu/FA-upload)

**BY MAIL TO:**

UMD Office of Financial Aid and Scholarships  
1049 University Drive  
Duluth MN 55812

**IN PERSON ON CAMPUS TO:**

**One Stop Student Services**  
23 Solon Campus Center

**QUESTIONS?**

Phone: 218-726-8000  
TTY (hearing impaired): 800-627-3529  
Email: [umdhelpp@d.umn.edu](mailto:umdhelpp@d.umn.edu)

**Complete this form in Adobe Reader software, not a Web browser, to ensure the privacy of your information. Place the cursor in a field and type. Print a copy to add required signature(s) in blue or black ink.**

Step 1. Student Information				
Name (last, first, middle initial)			UM ID #	Date
Step 2. Student Household Information				
<p><b>A.</b> List members in your household. Provide names, ages and relationships of all eligible household members for whom you (and/or your spouse) will provide more than 50% of financial support between July 1, 2023 and June 30, 2024. List only those family members who live in the same household with you, and if you are married, your spouse. Eligible household members include the following:</p> <ul style="list-style-type: none"> <li>• yourself (and your spouse if you are married),</li> <li>• your children, if you will provide <b>more than half their financial support</b> and you will continue to provide more than half their support from July 1, 2023 through June 30, 2024.</li> <li>• other people if they now live with you, receive <b>more than half their financial support</b> and will continue to receive more than half their support from you from July 1, 2023 through June 30, 2024.</li> </ul> <p><b>B.</b> If anyone listed <b>is or will be enrolled in a degree or certificate program at least half time</b> between July 1, 2023 and June 30, 2024, list the postsecondary institution they will attend. You may be required at a later date to provide confirmation of enrollment for all household members attending college <b>at least half time</b>.</p> <p><b>C.</b> For family members enrolled at least half time in a postsecondary institution, report the program level in which they are enrolled—<b>PSEOP</b> (Post- secondary Enrollment Options Program, i.e. college attendance prior to high school graduation), <b>undergraduate, or graduate</b>.</p>				
Name	Age	Relationship to student	Post-secondary institution they will attend at least half time from July 1, 2023 to June 30, 2024	Program level (PSEOP, undergraduate, or graduate)
		Self	University of Minnesota, Duluth	Undergraduate
		Spouse		
		Child		
		Child		
<p><b>More than five household members? YOU ARE REQUIRED TO ATTACH A LIST of the additional household members. Your list must include all of the information requested above for each additional person listed.</b></p>				



To request copies of this form in an alternative format: 218-726-8000. UMD is an equal opportunity employer and educator.

**Step 3. U.S. or Foreign Income, Student Section**

**If you filed a 2021 income tax return:**

You have options for verifying your 2021 tax return data. The quickest and most desirable is to use the IRS Data Retrieval Tool. You may transfer your tax data from the IRS to your FAFSA using the Department of Education’s IRS Data Retrieval tool. The tool is available at FAFSA.gov. Most filers will be eligible to use the retrieval tool; however, if you meet one of the restrictions the tool will let you know. We will receive your data within a few days of the successful transfer and will accept this confirmation in place of a tax return transcript. You must sign the FAFSA with your FSA ID and click “Submit” to successfully transfer your tax data to the FAFSA.

- You may provide a signed copy of your 2021 Federal tax return and all schedules that were filed with the IRS.
- Your other option is to request a **tax return transcript** directly from the IRS. A Tax Return Transcript may be obtained through:

**Get Transcript by MAIL:** Go to www.irs.gov, click “Get My Tax Record.” Click “Get Transcript by MAIL.” Make sure to request “IRS Tax Return Transcript” and **NOT** “IRS Tax Account Transcript”.

**Get Transcript ONLINE:** Go to www.irs.gov, click “Get My Tax Record.” Click “Get Transcript ONLINE.” Make sure to request “IRS Tax Return Transcript” and **NOT** “IRS Tax Account Transcript”.

**Automated Phone Request:** 1-800-908-9946

Once you receive the tax return transcript from the IRS you will need to send the entire transcript to our office. Please make sure to include your name and student ID on all documentation.

**If you did not file a 2021 income tax return:**

- I did not work in 2021.
- I worked in 2021, but was not required to file an income tax return. I have enclosed copies of my W-2 forms and listed my employers and 2021 income on the table below. (You must provide copies of all W-2(s).

**In both cases, you must provide a Verification of Non-filing letter from the IRS with this form. The confirmation can be obtained using the “Get Transcript by MAIL/ONLINE” above.**

Name of employer or source of income	2021 student income amount
	\$
	\$
	\$

**Step 3 continued, Spouse Section**

If you filed joint taxes with the student, there is nothing else you need to provide. However, if you did not file joint taxes, then you will need to either provide a signed copy of your 2021 Federal tax return and all schedules, or request a 2021 tax return transcript from the IRS using the process detailed above. This will need to be sent to us with this form. Please make sure to include the students name and student ID on all documentation.

**If you did not file a 2021 income tax return:**

- I did not work in 2021.
- I worked in 2021, but was not required to file an income tax return. I have enclosed copies of my W-2 forms and listed my employers and 2021 income on the table below.

**In both cases, you must provide a Verification of Non-filing letter from the IRS with this form. The confirmation can be obtained using the “Get Transcript by MAIL/ONLINE” above.**

Name of employer or source of income	2021 spouse income amount
	\$
	\$
	\$

**Step 4. Certification**

**You are required to sign and date this certification section. Signatures must be hand-signed in blue or black ink.** By signing this form, I/we certify that all the information I/we have reported on this form to qualify for federal student aid is complete and correct.

Student signature (required)	Date
Spouse signature	Date