IMMIGRANTS RISING
TRANSFORMING LIVES THROUGH EDUCATION

VERIFYING YOUR INCOME FOR THE 2020-21 CALIFORNIA DREAM APPLICATION

The California Student Aid Commission (CSAC) requires a certain percentage of students to verify the information reported on the California Dream Application. Students are informed if they need to complete this process via email or on the student portal at the universities listed on the application. Income verification means the student (and if required, their parents or spouse) must submit to the college or university that they plan to attend: 1) household verification worksheet and 2) a copy of their 2018 tax return transcripts, if taxes were filed. Additional documentation may also be required by the school. The financial aid office will update the student's CA Dream Application to match the household size and income per CSAC's guidelines. The verification process can take 3-4 weeks, once all documentation has been received.

DEPENDENT vs INDEPENDENT Students for the CA Dream Application

Dependent Students are under 24 years old or were born after 1/1/97, are single, have no children or other dependents, and are pursuing an undergraduate degree. **MUST provide student <u>and</u> parental household information regardless of** whether you live with your parents or receive their financial support. Some exceptions apply. Contact your school for details.

Independent Students meet at least one of the following conditions: are over 24 years old or were born before 1/1/97, are married, have children or other dependents for whom they provide 50% of their support, are a veteran or active duty, are an orphan or ward of the court, are at risk of homelessness, have a special circumstance or are pursuing a graduate degree. **MUST provide student household information.**

CA Dream Application Submitted → **Income Verification Submitted** → **CA Dream App Info Verified** → **Financial Aid Award Offered**

Income Verification for Tax Filers vs Non-Tax Filers

Tax Filers: If the parent and/or student worked and filed taxes, you are required to submit a copy of the <u>2018 tax return transcript</u>. Be sure to request the IRS tax <u>return</u> transcript, not the tax <u>account</u> transcript. 1040 Tax Forms are <u>not</u> acceptable. Tax return transcripts are available for free by contacting the Internal Revenue Service (IRS) via internet or phone. The person requesting the transcript must be the one who signed the taxes. If you have trouble obtaining a transcript, contact IRS customer service. Note: Tax Return Transcripts are not available until three weeks after filing if you file electronically, or up to six weeks if you file by mail. Dependent students and parents must submit their own transcripts if they filed taxes separately.

Non-Tax Filers: If you are a non-tax filer, be sure to list all 2018 household income earned, as well as financial assistance or benefits received on the income verification worksheet. Include a copy of your W-2 form(s). If you earned cash, and do not have a W-2 form, explain the circumstances on the worksheet. You may be required to include proof of non-filing from the IRS. Also, be aware that if you or your parents earned over the IRS income filing limits, you may be required to file taxes in order to receive a financial aid award.

Independent Students are over 24 years old or born before 1/1/97, are married, have children or other dependents for whom they provide 50% of their support, are a veteran or active duty, orphan or ward of the court, at risk of homelessness, have a special circumstance or are pursuing a graduate degree. **MUST provide student household information.**

Standard Income Verification Worksheet

Household Size: The rules of the CA Dream Application define households as the student; the biological or adoptive parents; siblings under the age of 24 in most cases; and/or other dependents for whom the parents are financially responsible. Additional family members or individuals that live within the home, but do not meet these requirements should not be included in the household.

Marital Status: Indicate whether the parent or student is single, married, separated or divorced, or widowed. Parents who are living together, but are not married should choose that option.

Tax Filing Status: Indicate whether the student and/or parent or spouse is a tax filer or a non-tax filer.

Financial Aid Received: List the amount of grants or scholarships received by the student during 2019 and the school(s) attended.

Child Support Paid: List the amount of any child support paid in 2019, including the child's name, the name of the person who paid child support, and the name of person to whom it was paid.

SNAP Benefits Received: Indicate whether you and/or your parents received SNAP benefits in 2019 or 2020. Documentation from the agency that issued SNAP benefits may be required upon request.

Certification and Signature: By signing the verification worksheet, the parent and student certify that all the information is true. Signing also authorizes the Financial Aid Office to update the student's California Dream Application per CSAC guidelines and the information provided.

Additional Documentation: The college or university has the right to ask for additional documentation regarding household size or income earned if it is necessary to gain an adequate understanding of how household expenses were met for 2019.

Multiple Schools: If you listed more than one school on the CA Dream Application, you will be required to complete income verification at each school individually.

Immigrants Rising helps you make decisions based on your potential, not your perceived limits. Visit our website so you can see what's possible: **www.immigrantsrising.org**. For inquiries regarding this resource, please contact Nancy Jodaitis, Director of Higher Education, at nancy@immigrantsrising.org