

**2020-2021  
 Sage Verification Form (V5)**

A. Student Information	
<b>Student Name:</b>	<b>7-digit NAU ID Number:</b>
<b>Phone:</b>	<b>NAU E-mail:</b>

Your 2020-2021 FAFSA was selected by the Department of Education for a review process called Verification. Federal law requires us to complete this review before awarding or disbursing federal aid. We will compare your FAFSA with the information on this form and any other documents requested now or throughout the award year. If there is conflicting information, we will make the corrections to your FAFSA and adjust aid as necessary. Learn more at: [nau.edu/verification](http://nau.edu/verification).

**Instructions:**

- Complete this form in its entirety; answer all questions. If a situation does not apply to you, your parents (if dependent), and your spouse (if applicable), enter **0** or **N/A**.  
***Incomplete forms will not be accepted and will delay processing.***
- Submit this form via mail or in person at either the Student Service Center (bldg. 60) or our office in Gammage (bldg. 1). Due to the content of the information requested, this form cannot be submitted electronically or via fax.

**B. Household Size – select ONE dependency status below & list household members as indicated**

**1. Select ONE dependency status below that corresponds to your answers on the FAFSA**

Dependent student – answered “No” to all Dependency Status questions on the FAFSA

List everyone in your parents’ household for whom they will provide more than half of their monetary support from July 1, 2020 through June 30, 2021, including:

- Yourself;
- Your parents (including a stepparent);
- Your parent’s (and stepparent’s) other children, even if they don’t live with your parents; and
- Other people, if they now live with your parents, and your parents provide more than half of their support and will continue to provide that support

Independent student – answered “Yes” to one or more Dependency Status questions on the FAFSA

List everyone in your household for whom you will provide more than half of their monetary support from July 1, 2020 through June 30, 2021, including:

- Yourself;
- Your spouse, if married;
- Your children, even if they do not live with you; and
- Other people, if they now live with you, and you will continue to provide their support

**2. List all household members specified in the applicable list above.**

Include the college name for any household member who will be enrolled at least half time at an eligible postsecondary educational institution any time between July 1, 2020 and June 30, 2021. *Attach additional pages if necessary.*

Full Names of Each Household Member	Age	Relationship to Student	College Attending 2020-21
		Self (student)	Northern Arizona University

**C. STUDENT – Tax Forms and Income Information** (include spouse, if applicable)

1. As of the date you filed the 2020-2021 FAFSA, were you married?  No – proceed to questions 2 & 4  
 Yes – proceed to questions 3 & 4

**2. Unmarried student: Did you file a 2018 federal tax return? (select one)**

<input type="checkbox"/> Yes	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>copy of 2018 tax return (signed &amp; with all schedules) <b>or</b> an IRS Tax Transcript  <i>**Waived if you used the IRS Data Retrieval Tool on the FAFSA.**</i></li> </ul> <p>If you are now separated or divorced:</p> <ul style="list-style-type: none"> <li>copy of 2018 tax return (signed &amp; with all schedules) <b>or</b> an IRS Tax Transcript, <b>and</b></li> <li>all 2018 W2s and/or 1099s for yourself</li> </ul>						
<input type="checkbox"/> Not yet – will file	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>all 2018 W2s and/or 1099s, <b>and</b></li> <li>copy of your submitted 4868 Tax Extension Form, <b>and</b></li> <li>copy of your un-expired IRS approval of extension</li> </ul>						
<input type="checkbox"/> No – no earnings from work	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>Dependent students – no tax information to submit</li> <li>Independent students – <a href="#">Verification of Non-Filing Letter</a></li> </ul>						
<input type="checkbox"/> No – had earnings from work but not required to file  <i>Note: Per IRS Publication 17, you must file a 2018 tax return if you earned \$12,000 or more.</i>	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>Enter all sources of earned income, <b>and</b></li> </ul> <table border="1" style="width: 100%;"> <tr> <td style="width: 10%;">Student</td> <td style="width: 70%;">Employer/Source: _____</td> <td style="width: 20%;">Amount: _____</td> </tr> <tr> <td></td> <td>Employer/Source: _____</td> <td>Amount: _____</td> </tr> </table> <ul style="list-style-type: none"> <li>all 2018 W2s and/or 1099s for income reported above, <b>and</b></li> <li>Independent students – <a href="#">Verification of Non-Filing Letter</a></li> </ul>	Student	Employer/Source: _____	Amount: _____		Employer/Source: _____	Amount: _____
Student	Employer/Source: _____	Amount: _____					
	Employer/Source: _____	Amount: _____					

**3. Married student: Did you and your spouse file a joint 2018 federal tax return? (select one)**

<input type="checkbox"/> Yes	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>copy of signed joint 2018 tax return (with all schedules) <b>or</b> an IRS Tax Transcript  <i>**Waived if you used the IRS Data Retrieval Tool on the FAFSA.**</i></li> </ul>										
<input type="checkbox"/> Not yet – will file a joint return	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>all 2018 W2s and/or 1099s for yourself and your spouse, <b>and</b></li> <li>copy of your submitted 4868 Tax Extension Form, <b>and</b></li> <li>copy of your un-expired IRS approval of extension</li> </ul>										
<input type="checkbox"/> No – each filed a separate return	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>copy of both tax returns (signed &amp; with all schedules) <b>or</b> IRS Tax Transcripts</li> </ul> <p>If one spouse filed a 2018 return and one did not:</p> <ul style="list-style-type: none"> <li>copy of signed tax return (with all schedules) <b>or</b> an IRS Tax Transcript, <b>and</b></li> <li><a href="#">Verification of Non-Filing Letter</a> for non-filing spouse</li> </ul>										
<input type="checkbox"/> No – one or both had earnings from work but neither required to file  <i>Note: Per IRS Publication 17, you must file a 2018 tax return if you earned \$24,000 or more.</i>	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>Enter all sources of earned income for person(s) not required to file a 2018 tax return, <b>and</b></li> </ul> <table border="1" style="width: 100%;"> <tr> <td rowspan="2" style="width: 10%;">Student</td> <td style="width: 70%;">Employer/Source: _____</td> <td style="width: 20%;">Amount: _____</td> </tr> <tr> <td>Employer/Source: _____</td> <td>Amount: _____</td> </tr> <tr> <td rowspan="2" style="width: 10%;">Spouse</td> <td style="width: 70%;">Employer/Source: _____</td> <td style="width: 20%;">Amount: _____</td> </tr> <tr> <td>Employer/Source: _____</td> <td>Amount: _____</td> </tr> </table> <ul style="list-style-type: none"> <li>all 2018 W2s and/or 1099s for income reported above, <b>and</b></li> <li><a href="#">Verification of Non-Filing Letters</a> for both</li> </ul>	Student	Employer/Source: _____	Amount: _____	Employer/Source: _____	Amount: _____	Spouse	Employer/Source: _____	Amount: _____	Employer/Source: _____	Amount: _____
Student	Employer/Source: _____		Amount: _____								
	Employer/Source: _____	Amount: _____									
Spouse	Employer/Source: _____	Amount: _____									
	Employer/Source: _____	Amount: _____									

**4. Did you and/or your spouse have untaxed income from either of the following on your 2018 tax return(s)?**

- IRA Distribution:  No  Yes – Rollover amount, if any: \$ \_\_\_\_\_
- Pension:  No  Yes – Rollover amount, if any: \$ \_\_\_\_\_

## D. PARENT – Tax Forms and Income Information *(dependent students only)*

1. As of the date you filed the 2020-2021 FAFSA, was the parent you listed on the FAFSA married?  No – proceed to questions 2 & 4  
 Yes – proceed to questions 3 & 4

### 2. Unmarried parent: Did they file a 2018 federal tax return? *(select one)*

<input type="checkbox"/> Yes	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>copy of their 2018 tax return (signed &amp; with all schedules) <b>or</b> an IRS Tax Transcript <b>**Waived if they used the IRS Data Retrieval Tool on the FAFSA.**</b></li> </ul> <p>If your parents separated or divorced since filing a 2018 return, submit:</p> <ul style="list-style-type: none"> <li>copy of their 2018 tax return (signed &amp; with all schedules) <b>or</b> and IRS Tax Transcript, <b>and</b></li> <li>all 2018 W2s and/or 1099s for parent listed on FAFSA</li> </ul>					
<input type="checkbox"/> Not yet – will file	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>all 2018 W2s and/or 1099s, <b>and</b></li> <li>copy of their submitted 4868 Tax Extension Form, <b>and</b></li> <li>copy of their un-expired IRS approval of extension</li> </ul>					
<input type="checkbox"/> No – no earnings from work	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li><a href="#">Verification of Non-Filing Letter</a></li> </ul>					
<input type="checkbox"/> No – had earnings from work but not required to file	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>Enter all sources of earned income, <b>and</b></li> </ul> <table border="1" style="width: 100%;"> <tr> <td rowspan="2" style="width: 10%;">Parent</td> <td style="width: 60%;">Employer/Source: _____</td> <td style="width: 30%;">Amount: _____</td> </tr> <tr> <td>Employer/Source: _____</td> <td>Amount: _____</td> </tr> </table> <ul style="list-style-type: none"> <li>all 2018 W2s and/or 1099s for income reported above, <b>and</b></li> <li><a href="#">Verification of Non-Filing Letter</a></li> </ul>	Parent	Employer/Source: _____	Amount: _____	Employer/Source: _____	Amount: _____
Parent	Employer/Source: _____		Amount: _____			
	Employer/Source: _____	Amount: _____				

### 3. Married parent: Did your parent & their spouse file a joint 2018 federal tax return? *(select one)*

<input type="checkbox"/> Yes	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>copy of signed joint 2018 tax return (with all schedules) <b>or</b> an IRS Tax Transcript <b>**Waived if they used the IRS Data Retrieval Tool on the FAFSA.**</b></li> </ul>										
<input type="checkbox"/> Not yet – will file a joint return	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>all W2s and/or 1099s for parent and spouse, <b>and</b></li> <li>copy of their submitted 4868 Tax Extension Form, <b>and</b></li> <li>copy of their un-expired IRS approval of extension</li> </ul>										
<input type="checkbox"/> No – each filed a separate return	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>copy of both tax returns (signed &amp; with all schedules) <b>or</b> IRS Tax Transcripts</li> </ul> <p>If one spouse filed a 2018 return and one did not:</p> <ul style="list-style-type: none"> <li>copy of signed tax return (with all schedules) <b>or</b> an IRS Tax Transcript, <b>and</b></li> <li><a href="#">Verification of Non-Filing Letter</a> for non-filing spouse</li> </ul>										
<input type="checkbox"/> No – one or both had earnings from work but neither required to file  <small>Note: Per IRS Publication 17, you must file a 2018 tax return if they earned \$24,000 or more.</small>	<p><b>Submit:</b></p> <ul style="list-style-type: none"> <li>Enter all sources of earned income for person(s) not required to file a 2018 tax return, <b>and</b></li> </ul> <table border="1" style="width: 100%;"> <tr> <td rowspan="2" style="width: 10%;">Parent</td> <td style="width: 60%;">Employer/Source: _____</td> <td style="width: 30%;">Amount: _____</td> </tr> <tr> <td>Employer/Source: _____</td> <td>Amount: _____</td> </tr> <tr> <td rowspan="2" style="width: 10%;">Spouse</td> <td style="width: 60%;">Employer/Source: _____</td> <td style="width: 30%;">Amount: _____</td> </tr> <tr> <td>Employer/Source: _____</td> <td>Amount: _____</td> </tr> </table> <ul style="list-style-type: none"> <li>all 2018 W2s and/or 1099s for income reported above, <b>and</b></li> <li><a href="#">Verification of Non-Filing Letters</a> for both</li> </ul>	Parent	Employer/Source: _____	Amount: _____	Employer/Source: _____	Amount: _____	Spouse	Employer/Source: _____	Amount: _____	Employer/Source: _____	Amount: _____
Parent	Employer/Source: _____		Amount: _____								
	Employer/Source: _____	Amount: _____									
Spouse	Employer/Source: _____	Amount: _____									
	Employer/Source: _____	Amount: _____									

### 4. Did your parent and/or their spouse have untaxed income from either of the following on their 2018 tax return(s)?

- IRA Distribution:  No  Yes – Rollover amount, if any: \$ \_\_\_\_\_
- Pension:  No  Yes – Rollover amount, if any: \$ \_\_\_\_\_

**E. Identity and Statement of Educational Purpose** *(to be signed at the institution)*

The student **must appear in person at Northern Arizona 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. *(Note: If unable to attend in person, skip to section F and sign in the presence of a Notary Public.)*

The institution will maintain a copy of the student's photo ID that is annotated by the institution 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.

**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 Northern Arizona University for 2020-2021.**

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

\_\_\_\_\_  
Date

**F. Identity and Statement of Educational Purpose** *(to be signed in the presence of a notary)*

If the student **is unable to appear in person at Northern Arizona University** to verify his or her identity, the student must provide the institution both of the following items:

1. A legible copy of the unexpired valid government-issued photo identification 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**
2. The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page other than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**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 Northern Arizona University for 2020-2021.**

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

\_\_\_\_\_  
Date

**Notary's Certificate of Acknowledgement:**

*On this date, \_\_\_\_\_, the student listed below personally appeared and proved to me on the basis of satisfactory evidence of identification to be the person who signed the foregoing instrument.*

Printed name of signer: \_\_\_\_\_

Type of unexpired government-issued photo ID provided: \_\_\_\_\_

Notary name: \_\_\_\_\_

State of \_\_\_\_\_ City/County of \_\_\_\_\_

***WITNESS my hand and official seal***



Notary signature: \_\_\_\_\_

Date commission expires: \_\_\_\_\_

**G. Agreement and Understanding** *(please read carefully before signing)*

By signing this form, you certify that all of the information reported on this form is true and accurate to the best of your knowledge. If requested, you agree to provide proof of the information that you have reported on this form. If you purposely give false or misleading information on your FAFSA or on this form, you may be fined, sentenced to jail, or both (20 U.S. Code § 1097) and may face disciplinary action at Northern Arizona University.

**Important:** *Review this form before signing to confirm all fields have been completed. If a situation does not apply to you, enter 0 or N/A. Incomplete forms will not be processed and will be shredded for security purposes.*

***Hand-written signature only; typed, electronic, or digital signatures cannot be accepted.***

<b>Student Signature:</b>	<b>Date:</b>
<b>Parent Signature:</b> <i>(dependent students only)</i>	<b>Date:</b>