

2023-2024 CHANGE IN STUDENT'S MARITAL STATUS APPEAL

Student Name (please print)

Spouse's Name (please print)

Campus ID Number

Who should submit this form?

Students who marry after filing the Free Application for Federal Student Aid (FAFSA) as a dependent student. **Note:** Completion of this appeal does not guarantee approval of your request. This form is only for students. Parents of dependent students whose marital status changes after filing the FAFSA should contact the Office of Scholarships and Financial Aid.

When should this form be submitted?

Submit the 2023-2024 Change in Student's Marital Status Appeal form by **March 1, 2024**. Incomplete appeals will result in a delay in processing.

Have you already completed your 2023-2024 FAFSA?


- ☐ **No, complete and sign the 2023-2024 FAFSA** available at [StudentAid.gov](https://studentaid.gov) based on your current dependency status.
- ☐ **Yes, correct your marital status on your 2023-2024 FAFSA** available at [StudentAid.gov](https://studentaid.gov) to show that you are "Married." The Central Processing Service (CPS) may retain and assign your FAFSA the status "Rejected" and forward it to the Office of Scholarships and Financial Aid for review.

Required Documentation

Submit **all** of the following documents to substantiate your appeal:

- ☐ A copy of your marriage certificate.
- ☐ A completed copy of the 2023-2024 Household Size and Number in College Verification – Independent Student.
- ☐ A completed copy of the 2023-2024 Income Verification – Independent Student.
- ☐ A completed copy of the 2023-2024 Asset Verification Worksheet (including both your and your spouse's assets).
- ☐ A **signed** copy of your and your spouse's (if filed separately) 2021 IRS Tax Return(s) Form 1040 including any applicable Schedules: 1, 2, 3.
- ☐ A completed and signed copy of this appeal form including all above required documentation.

Certification and Signature

 **SIGNATURE REQUIRED:** I certify that the information I have provided on this form and on all documents is true and complete to the best of my knowledge. Upon request I will provide additional documentation to substantiate the information provided. I understand that based on the documentation provided changes in my FAFSA financial information may occur and may result in a change in financial aid eligibility.

- ☐ By submitting this appeal, I am indicating changes that more equitably reflect my current finances.
- ☐ I understand, if approved, parent income, assets, and household size data will be disregarded and my, the student, and my spouse's income, assets, and household size will be used.

Student Signature

Date

| | | |
|---|--|------------------------------|
|  | 2023-2024 Household Size & Number in College Independent Student | VHSI 24 |
| | OFFICE OF SCHOLARSHIPS AND FINANCIAL AID WARRINER HALL 202, MOUNT PLEASANT, MI 48859 PHONE: (989) 774-3674; FAX: (989) 774-3634 HTTPS://FINANCIALAIDPORTAL.APPS.CMICH.EDU | |

Why have you received this form? The Federal Processor has selected your Free Application for Federal Student Aid (FAFSA) for a process called "Verification."

When should this form be submitted? Failure to complete and submit this form along with all required documentation to the Office of Scholarships and Financial Aid **within 21 business days** may result in the cancellation of your federal financial aid.

Student Information


Student Name (please print) Campus ID Number

Number of Household Members

- **List all household members** who meet the following criteria.
- Attach a separate sheet, if needed.
- Yourself; and
 - Your spouse, if you are married; and
 - You and/or your spouse’s children from this household; even if they do not currently live with you, **IF**:
 - You or your spouse will provide more than half of their support from July 1, 2023 through June 30, 2024.
 - Other people: List **only if they now live with you** and will continue to live with you through June 30, 2024 **AND** only if you and/or your spouse provide/will continue to provide **more than half of their support** through June 30, 2024. Do not include roommates.

| Full Name of Household Member | Age Required | Relationship to Student If "Other" is checked, relationship must be indicated. | Will household member attend college at least half-time (6 semester credits/term) in a degree/certificate program between 7/1/23 and 6/30/24? If yes, list name of college. |
|-------------------------------|-----------------|---|---|
| | | Self | Central Michigan University |
| | | Spouse (if married) | <input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____ |
| | | <input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____ | <input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____ |
| | | <input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____ | <input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____ |
| | | <input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____ | <input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____ |
| | | <input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____ | <input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____ |

Certification and Signature

 **SIGNATURE REQUIRED:** I certify that the information provided on this form is true and complete to the best of my knowledge. I understand that based on the information provided changes in my FAFSA financial information may occur and may result in a change in financial aid eligibility.

Student Signature Date



2023-2024 Income Verification – Independent Student

OFFICE OF SCHOLARSHIPS AND FINANCIAL AID
WARRINER HALL 202, MOUNT PLEASANT, MI 48859
PHONE: (989) 774-3674; FAX: (989) 774-3634
HTTPS://FINANCIALAIDPORTAL.APPS.CMICH.EDU

VINI 24

Why have you received this form? The Federal Processor has selected your Free Application for Federal Student Aid (FAFSA) for a process called "Verification." **When should this form be submitted?** Failure to complete and submit this form with all required documentation to the Office of Scholarships and Financial Aid **within 21 business days** may result in the cancellation of your federal financial aid.

Student Information

Student Name (please print)

Spouse's Name if applicable (please print)

Campus ID Number

Student and Spouse's (if applicable) Income Information

You must indicate the appropriate 2021 IRS Tax Filing Status below for both you and your spouse if you are married. If you and your spouse filed separately in 2021, both student and spouse must provide their corresponding 2021 IRS Tax Filing Status documentation. Please select only one 2021 IRS Tax Filing Status per person.

| Student | Spouse (if applicable) | 2021 IRS Tax Filing Status and Required Documentation: | | | | | | | | | | | | |
|--------------------------|---------------------------|--|------------------------|------------------|------------------------------|--|--|--|--|--|--|--|--|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <p>I filed a 2021 IRS Tax Return and have/will complete IRS Data Retrieval (IRS DRT) on the FAFSA to transfer 2021 IRS Tax Return information into the FAFSA and made no changes to the information before submitting 'OR'</p> <p>➤ SUBMIT a signed copy of your 2021 IRS Tax Return Form 1040 including any applicable Schedules: 1, 2, 3.</p> | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>I did NOT file and was not required to file a 2021 IRS Tax Return 'AND' <u>earned</u> income from work in 2021.</p> <p>➤ SUBMIT the following:</p> <p><input type="checkbox"/> Copies of ALL your 2021 W-2 Form(s); AND</p> <p><input type="checkbox"/> LIST BELOW every employer you earned income from work in 2021;</p> <table><thead><tr><th>Name of Student/Spouse</th><th>Name of Employer</th><th>Dollar Amount Earned in 2021</th></tr></thead><tbody><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></tbody></table> <p><input type="checkbox"/> A copy of your 2021 IRS Verification of Non-Filing Letter dated on or after October 1, 2022;</p> <p><input type="checkbox"/> OR You attempted to obtain your 2021 IRS Verification of Non-Filing Letter and were unable to obtain the required documentation.</p> | Name of Student/Spouse | Name of Employer | Dollar Amount Earned in 2021 | | | | | | | | | |
| Name of Student/Spouse | Name of Employer | Dollar Amount Earned in 2021 | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>I did NOT file and was not required to file a 2021 IRS Tax Return 'AND' <u>did NOT</u> earn income from work in 2021.</p> <p>➤ SUBMIT the following:</p> <p><input type="checkbox"/> A copy of your 2021 IRS Verification of Non-Filing Letter dated on or after October 1, 2022;</p> <p><input type="checkbox"/> OR You attempted to obtain your 2021 IRS Verification of Non-Filing Letter and were unable to obtain the required documentation.</p> | | | | | | | | | | | | |

Certification and Signature



SIGNATURE REQUIRED: I certify that the information I have provided on this form and on all documents is true and complete to the best of my knowledge. I understand that based on the documentation provided changes in my FAFSA financial information may occur and may result in a change in financial aid eligibility.

Student Signature

Date

2023-2024 STUDENT ASSET VERIFICATION WORKSHEET

Student Name (please print)

Spouse's Name if applicable (please print)


Campus ID Number

Student and/or Spouse (if applicable) Asset Information

Please list the market value and debt for all assets that you (and your spouse) own. **These values should reflect the values as of the day the Free Application for Federal Student Aid (FAFSA) was first submitted.**

| | Asset Type | Student | | Spouse | |
|--|--------------------------------------|---------|------|--------|------|
| | | Asset | Debt | Asset | Debt |
| Reporting Information: Excluded Assets: Do not report principal residence, family farms, or retirement plans (IRA, Keogh, 401(k), etc.) Trust Funds: Current value, plus interest, unless trust is restricted by court order (i.e., to cover future medical expenses in insurance settlement). Qualified Tuition Programs: Michigan Education Trust (MET) and Michigan Education Savings Plan (MESP) are considered an asset of the parent if owned by parent or student. Custodial Accounts for Minor Children (i.e. Uniform Gifts to Minors): Report only your share of joint account. Savings Bond: For bonds that have not matured, check with your bank for current values. Other Investments: Include commodities, precious and strategic metals, etc. Installment or Land Contracts: Report the current principal and interest balance remaining on contract. | Cash, savings, and checking accounts | \$ | | \$ | |
| | Trust Funds | \$ | \$ | \$ | \$ |
| | Qualified Tuition Programs | \$ | \$ | \$ | \$ |
| | Money Market/CDs | \$ | | \$ | |
| | Mutual Funds | \$ | | \$ | |
| | Stock | \$ | | \$ | |
| | Bonds | \$ | | \$ | |
| | Custodial Accounts | \$ | | \$ | |
| | Other Investments | \$ | | \$ | |
| | Rental Property | \$ | \$ | \$ | \$ |
| | Second Home | \$ | \$ | \$ | \$ |
| | Land Contracts | \$ | \$ | \$ | \$ |
| | Other Real Estate | \$ | \$ | \$ | \$ |
| | Business/Partnership | \$ | \$ | \$ | \$ |
| | Non-Family Farm(s) | \$ | \$ | \$ | \$ |
| | S-Corporation(s) | \$ | \$ | \$ | \$ |

Certification and Signature

 **SIGNATURE REQUIRED:** I certify that the information I have provided on this form and on all documents is true and complete to the best of my knowledge. If requested, I agree to provide documentation to support the above statement.

Student Signature

Date

2023-2024 Tax Document Guide

IMPORTANT: When submitting your IRS tax return or transcript(s) to the Office of Scholarships and Financial Aid make sure you place your student name and campus ID number on each page so we know that it is part of your financial aid record. Not doing so may cause a delay in processing.

| Type of Tax Document: | How to Obtain: |
|---|--|
| Signed IRS Tax Return: <ul style="list-style-type: none"> Submit a copy of your 2021 IRS Tax Return with your signature on page 1 or 2 of your Form 1040 and include any applicable Schedules: 1, 2, and 3. If you filed electronically, print a copy of your IRS Tax Return and sign page 1 or 2 of your Form 1040 before submitting. Do not send your City or State Tax Return. Make a copy of your 2021 IRS Tax Return. Do not send us your only copy. Do not send your Tax Summary Page – Send a copy of your 2021 IRS Tax Return Form 1040. | <p>Request Copy From Your Tax Preparer: Contact your Tax Preparer and request a copy of your 2021 IRS Tax Return.</p> <p>Online System Request: If you used an online system such as TurboTax or TaxAct then you should be able to log in to the system and pull up a copy of your 2021 IRS Tax Return and print off a copy.</p> <p>Don't Have a Copy or Unable to Locate a Copy?: Request a copy of your 2021 IRS Tax Return Transcript from the IRS (directions below).</p> |
| IRS Tax Return Transcript: <ul style="list-style-type: none"> Includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. In some instances, may substitute for your 2021 IRS Tax Return. Make sure to submit a copy of each page of your transcript as many transcripts are double-sided documents and we will need a copy of each page. | <p>Telephone Request: Call 1-800-908-9946 and make sure to request the “IRS Tax Return Transcript” for tax year ending 12/31/2021.</p> <p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Tax Return Transcript” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then enter your tax form number on line 6 and then check box 6a for “IRS Tax Return Transcript”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p> |
| Signed Amended IRS Tax Return: <ul style="list-style-type: none"> Submit a signed copy of your 2021 Amended IRS Tax Return Form 1040X. If you filed electronically, print a copy of your IRS Tax Return and sign page 1 or 2 before submitting. | <p>Request Copy From Your Tax Preparer: Contact your Tax Preparer and request a copy of your 2021 IRS Tax Return.</p> <p>Online System Request: If you used an online system such as TurboTax or TaxAct then you should be able to log in to the system and pull up a copy of your 2021 Amended IRS Tax Return and print off a copy.</p> <p>Don't Have a Copy or Unable to Locate a Copy?: Request a copy of your 2021 IRS Record of Account Transcript from the IRS (directions below).</p> |
| IRS Record of Account Transcript: <ul style="list-style-type: none"> Includes most of the line items of a tax return as filed with the IRS. As well as reflect changes made to the account after the original return is processed. In some instances, may substitute for your 2021 Amended IRS Tax Return Form 1040X. Make sure to submit a copy of each page of your transcript as many transcripts are double-sided documents and we will need a copy of each page. | <p>Telephone Request: Call 1-800-908-9946 and make sure to request the “IRS Record of Account Transcript” for tax year ending 12/31/2021.</p> <p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Record of Account Transcript” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then enter your tax form number on line 6 and then check box 6c for “IRS Record of Account Transcript”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p> |
| IRS Wage and Income Tax Transcript: <ul style="list-style-type: none"> Includes the data from any W-2, 1099 series, 1098 series, or 5498 series forms. May substitute for any 2021 W-2 Form, 1099 Form, 1098 Form, or 5498 Form. | <p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Wage and Income Tax Transcript” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then check box 8 for “Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p> |
| IRS Verification of Non-Filing Letter: <ul style="list-style-type: none"> Proof from the IRS that you did not file a return for the tax year requested. IRS Verification of Non-Filing Letters for tax year 2021 must be obtained on or after October 1, 2022. | <p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Verification of Non-Filing Letter” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then check box 7 for “IRS Verification of Non-Filing”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p> |