



VERIFICATION INSTRUCTIONS Financial Aid Office 2020/2021

Blue Mountain Community College
PO Box 100
Pendleton, OR 97801
(541) 278-5759 Phone - Service Center
(541) 278-5889 Fax
FinancialAid@bluecc.edu E-mail

There are three types of verification groups determined by the Federal processor. Based on the type of verification you have been selected for, BMCC must collect certain documents supporting information you reported on your 2020-2021 Free Application for Federal Student Aid (FAFSA).

Federal aid program rules (34 CFR, Part 668.54) state that a Financial Aid Office has the right to require documentation necessary to perform this verification before awarding federal aid. BMCC also has the right to verify what we believe to be conflicting information even if the student was not selected for verification. Changes to the FAFSA may cause the student to be selected for further verification. Please check your Wolf-Web Financial Aid portal frequently for notifications from Financial Aid.

Based on the information provided during verification, necessary changes to your FAFSA are electronically submitted to the Federal processor by BMCC's Financial Aid Office. You'll receive a revised Student Aid Report (SAR). Verification is complete when all requested information is submitted and any necessary corrections have been made. The deadline to complete verification is 9/1/21 or 120 days after your last day of enrollment, whichever is earlier.

Failure to provide all requested information will result in your application not being processed and no aid awarded. Documents received are logged in within three business days.

A student may be selected for verification **after being awarded**. If this is the case, and depending on the documents needed, BMCC may cancel the award for the year until the verification is completed.

WHAT YOU NEED TO DO:

Go to www.bluecc.edu, click on **Current Students**, click on **Wolf-Web** (log in required), **Financial Aid**, under the 2020/21 academic year, click on "What is Needed To Complete My File?" (Docs Needed/Received/Message Board). Based on your type of verification, **you may be required to submit one or more of the following:**

- ✓ A **completed, signed, and dated Verification Worksheet**. A symbol like this one (>>) indicates a question to answer or a document to submit. All questions must be answered and documents submitted for the form to be considered complete.
- ✓ **Federal Tax Return Filers**: 2018 IRS Tax Return Transcript(s) unless your data comes directly from the IRS Data Retrieval Tool within the FAFSA. BMCC strongly recommends you use the IRS Data Retrieval Tool (DRT) when possible.
- ✓ **Independent/Parent Non-Tax Filers**: A Verification of Non-Filing Letter from the IRS, and Wage & Income Transcript(s). Copies of all 2018 W-2s and 1099s can substitute for the Wage & Income Transcript(s).
- ✓ High School Verification form (follow instruction on the form).
- ✓ Identity and Statement of Educational Purpose form (follow instructions on the form).

THINGS YOU SHOULD KNOW:

- **Marital Status** for yourself or your parent(s) is determined as of the date your FAFSA is initially submitted.

If your **IRS tax information** is requested and you are a:

Dependent student - we need a copy of:

1. Your 2018 IRS Tax Return Transcript (TRT) **and** Wage & Income Transcript (or all W-2s and 1099s).
2. Your parent(s) 2018 IRS TRT and Wage & Income Transcript - follow scenario A or B.
 - A. **If your legal parents (biological or adoptive) regardless of their marital status or gender, live together:**
 - Submit a copy of their joint 2018 IRS TRT and Wage & Income Transcript (or all W-2s and 1099s), or
 - If they filed separately, submit a copy of their 2018 IRS TRT **and** Wage & Income Transcript (or all W-2s and 1099s) for each parent.
 - B. **If your parent is Single, Separated, Divorced, or Widowed;**
 - Submit a copy of that parent's 2018 IRS TRT **and** Wage & Income Transcript (or all W-2s and 1099s). (Note: If the parent filed a joint return, W-2s and 1099s are also required so income can be separated.)

Independent Student - follow scenario A or B

- A. **If your marital status is Single, Divorced or Widowed;**
 - Submit a copy of your 2018 IRS TRT **and** Wage & Income Transcript (please submit copies of all W-2s and 1099s if you filed jointly so that income can be separated).

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B. If your marital status is Married/Remarried;

- Submit a copy of your joint 2018 IRS TRT **and** Income & Wage Transcript (or all W-2s and 1099s), or;
- If you and your spouse filed separately, submit a copy of the 2018 IRS TRT **and** Wage & Income Transcripts (or all W-2s and 1099s) for each of you.

PLEASE NOTE: After review of the required 2018 TRT or DRT information, we may require copies of 2018 W-2 and 1099 for some tax filers to resolve conflicting income from work information.

BMCC's detail instructions to obtain IRS documents can be found on the [Student Forms](#) page or by clicking [here](#).

If you amended your return, provide BOTH of the following:

- The 2018 Tax Return Transcript; **and**
- A signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return" that was filed with the IRS.

If you were a Victim of IRS Identity Theft:

- Contact the IRS at 1-800-908-4490. Once the tax filer's identity is authenticated, the IRS will provide the information by U.S. Postal Service a Tax Return Database View (TRDBV) transcript. You will need to provide any W-2 and 1099; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

If you Filed Non-IRS Income Tax Returns:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2018; you will also need to provide any W-2(s) and 1099(s); *or*
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2018 income tax return(s) along with any W-2(s) and 1099(s).

If you were granted a Filing Extension:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2018; *or*
 - A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2018; **and**
 - A copy of IRS Form W-2 for each source of employment income received for tax year 2018 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2018.
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IF YOU ARE ASKED TO VERIFY HOUSEHOLD SIZE ON THE VERIFICATION WORKSHEET AND YOU ARE:

- 1) A **DEPENDENT STUDENT**, include in your household*:
 - Yourself; and
 - Your parent(s), including stepparent who you live with or you included on the FAFSA, and
 - Your parent(s) other children - **only if**
 - a) your parent(s) will provide more than half of their support from 07/01/20 through 06/30/21; or
 - b) the children would be required to provide parental information if they were completing a FAFSA for 2020-2021;and
 - Other people, **only if**
 - a) they now live with your parents, and
 - b) your parent(s) provide more than half of their support, and
 - c) your parent(s) will continue to provide more than half of their support from 07/01/20 through 06/30/21.

*** Parent's Household:** If your legal parents (biological and/or adoptive) live together (married or not), include both, regardless of their gender. If your parents are divorced or separated, include the parent you lived with more during the past 12 months. If you did not live with one parent more than the other, include the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent. If you have a stepparent who is married to your legal parent, include your stepparent. If your parent is widowed or never married, include that parent. (Grandparents, legal guardians, aunts, and uncles are not considered parents unless they have legally adopted you.)

HOUSEHOLD MEMBERS IN COLLEGE – **Always include yourself**, plus any other household member who will be attending college **at least half-time in a program of study that leads to a college degree or certificate**. DO NOT include your parents.

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- 2) AN **INDEPENDENT STUDENT**, include in your household:
- Yourself;
 - Your spouse;
 - Your/spouse's children – **only if** you/spouse will provide more than half of their support from 07/01/20 through 06/30/21 even if the children do not live with you/spouse; and
 - Other people currently living with you – **only if** you provide more than half of their support and you will continue to provide more than half of their support from 07/01/20 through 06/30/21.

HOUSEHOLD MEMBERS IN COLLEGE – **Always include yourself**, plus any other household member who will be attending college **at least half-time in a program of study that leads to a college degree or certificate.**

Submit all items requested and direct any Financial Aid questions as follows:

Mail: BMCC, Financial Aid Office, P.O. Box 100, Pendleton, OR 97801

Fax: 541-278-5889

Email: FinancialAid@bluecc.edu

In person at the BMCC Service Center nearest you

Blue Mountain Community College Non-discrimination Statement:

It is the policy of the Blue Mountain Community College Board of Education and School District that there will be no discrimination or harassment on the grounds of race, color, sex, marital status, sexual orientation, religion, national origin, age or disability in any educational programs, activities or employment. Persons having questions about equal opportunity and nondiscrimination should contact the BMCC Title IX Coordinators, Room M-152 or Room M-4B, Morrow Hall, Blue Mountain Community College, 2411 NW Carden Pendleton OR 97801, Phone 541-278-5796 or 541-278-5947, bclmetsen@bluecc.edu or njaim@bluecc.edu. For hearing impaired assistance please call Oregon Relay at 7-1-1.