

University of Idaho

Student Financial Aid Services
875 Perimeter Drive MS4291
Moscow, ID 83844-4291
PHONE: 208-885-6312
FAX: 208-885-5592
EMAIL: finaid@uidaho.edu
WEB: <https://www.uidaho.edu/financial-aid>

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Student Marriage Appeal Form 2020-2021

Student: _____ Student V#: _____
Please Print

Today's Date: _____ Phone #: _____

Congratulations on your recent marriage! The financial aid office needs certain financial information, documentation of marriage, and household size verification, before we can adjust your FAFSA to reflect this change:

- _____ 1) A copy of your marriage certificate.
- _____ 2) A signed copy of both your and your spouse's 2018 federal tax return. *(If both you and your spouse are students at UI and were able to successfully use IRS DRT on each FAFSA, this step may not be necessary.)*
- _____ 3) Copies of all 2018 W-2s, 1099s and/or signed Schedule C's (or other signed tax Schedules if your spouse earns income from another method not shown through a Schedule C, i.e. farming income, etc.).
- _____ 4) Please complete all the questions on this form about yourself and your spouse. If you or your spouse did not file taxes in 2018, please also complete the non-filer section of this form (Section F).

Blank is NOT a valid answer (enter a zero or N/A). Please sign where indicated.

Section A: Student and Spouse Taxable Income January 2018 – December 2018	Student + Spouse Amount
Unemployment Compensation	\$
Interest or Dividend Income	\$
Business or Farm Income (or Loss)	\$
Capital Gains (or Loss)	\$
IRA or Pension Distribution	\$
Rental Income or Partnership Income/Royalties	\$
Other:	\$

Section B: Student and Spouse Untaxed Income January 2018 – December 2018	Student + Spouse Amount
Child support received for any of your children. Do not include foster care or adoption payments.	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.	\$
Veteran's non-education benefits, such as Disability, Death Pension, Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
Other untaxed income and benefits not reported on the FAFSA, such as workers' compensation, disability, etc. Also include the untaxed portions of Health Savings Accounts from IRS form 1040 Schedule 1–line 25. Do not include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$

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Section C: Student and Spouse Income Exclusions January 2018–December 2018	Student + Spouse Amount
Child support PAID because of divorce or separation or as a result of a legal requirement. Do not include support for children living in your household, as reported in the household size of the FAFSA	\$
Taxable earnings from need-based employment programs, such as Federal or State Work-Study and need-based employment portions of fellowships and assistantships.	\$
Grants and/or scholarship aid reported to the IRS in your or your spouse's adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grants or scholarship portions of fellowships and assistantships. Note: This is not the total amount of grants and scholarships you received in 2018 (as reported on the 1098T) - it is the taxable amount of grants and scholarships you included on your tax return. If you enter an amount here it means: 1) that you filed a federal tax return and 2) you included grants and/or scholarships as part of the income reported on the tax return.	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not include untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
Earnings from work under a cooperative education program offered by a college. A cooperative education program is an educational system in which students may earn academic credit for career work done in their field of study (i.e. a paid internship for which you also earned credit).	\$

Section D: Student and Spouse Assets at FAFSA Submittal (see below for more info)*	Student + Spouse Amount
Cash, Savings and Checking Accounts as of the date the 20-21 FAFSA was filed. Do not include financial aid funds.	\$
Investment net worth (current value minus debt), including real estate as of the date the 20-21 FAFSA was filed. Do not include the value of retirement accounts such as a 401(k) or IRA, or the value of your primary residence.	\$
Net worth of business (business value minus debt) and/or farm (farm value minus debt) as of the date the 20-21 FAFSA was filed.** Do not include the value of a small business that you own and control and that has 100 or fewer full-time or full-time equivalent employees. Do not include the value of a family farm that you live on and operate.	\$

Section E: Student and Spouse Household Size (see below for more info)**	
How many people are in your household?	
How many in the question above will be college students between July 1, 2020 and June 30, 2021?	

Additional Directions for Section D*

Net worth means current value minus debt. If net worth is negative, enter 0. Investments **do not include** the home you live in, the value of life insurance and retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) and prepaid tuition plans, cash, savings and checking accounts already reported. Investments **do include** real estate, trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, Coverdale savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. *Investment value* includes the market value of these investments as of today. *Investment debt* means only those debts that are related to the investments. Business (of more than 100 employees) or investment farm value includes the market value of land, buildings, machinery, equipment, and inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Additional Directions for Section E**

Include in **your household**: Yourself (the student); Your spouse; Yours and your spouse's children if you or your spouse will provide more than half of their financial support from July 1, 2020 through June 30, 2021. Include children who meet these standards, even if a child does not live with you or your spouse; Other people if a) they now live with you AND b) you and your spouse provide more than half of their support, and will continue to provide more than half of their support from July 1, 2020 through June 30, 2021.

CERTIFICATION: By signing this worksheet, we certify that all the information reported on it is complete and correct. If you purposely give false or misleading information, you may be fined, sent to prison, or both. Both student and spouse must sign.

 Student Signature

 Date

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Section F: (Required for non-tax filers – if BOTH you & your spouse filed taxes in 2018, skip this section)

1) Check the boxes that apply and complete the table below:

- Neither I nor my spouse was employed and we had no income earned from work in 2018. (Skip to Step 3).
- I or my spouse was employed in 2018 and have listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	IRS W-2 Provided?	Whose Income?	Annual Amount Earned in 2018
<i>(Example) ABC's Auto Body Shop*</i>	Yes	SELF	\$4,500.00

2) Provide a copy of the W-2 for each employer listed above.

- If you do not have a copy of your W-2, use IRS form 4506-T & select box 8 to request a copy from the IRS (<https://www.irs.gov/uac/about-form-4506t>)

3) Provide verification of non-filing from the IRS or other relevant tax authority dated on or after Oct. 1, 2019

(see bottom of this form for instructions on how to request a Verification of Non-Filing (VNF) Letter from the IRS).

- Confirmation of non-filing is provided (for both myself and spouse if applicable)
- Confirmation of non-filing has been requested and will be provided upon receipt (for both myself and spouse if applicable)
- I/we Attempted to obtain the VNF from the IRS or other tax authorities and was unable to obtain the required documentation

CERTIFICATION: By signing this worksheet, we certify that all the information reported on it is complete and correct. If you purposely give false or misleading information, you may be fined, sent to prison, or both. Both student and spouse must sign.

Student Signature

Date

Spouse Signature

Date

Requesting a Verification of Non-Filing Letter from the IRS

Non-filers can request a **Verification of Non-Filing Letter (VONF)**, free of charge, from the IRS in one of two ways – online or paper request. Please be sure to keep a copy for your records.

Online Request - Available at www.irs.gov

- Click "Get My Tax Record"
- Click "Get Transcript Online" (If at any point, you cannot validate your identity – for example, you cannot provide financial verification information, you may order a copy of the VONF letter using the paper request – see below)
- Once logged into the system, select "**Verification of Non-Filing Letter**" and in the Tax Year field, select "**2018**"
- If successfully validated, you will be able to view your IRS VONF
- Submit a copy of the IRS VONF to our office; make sure to include your name and Vandal ID number on the letter

Paper Request Form – IRS Form 4506T

- Download IRS Form 4506-T at <https://www.irs.gov/uac/about-form-4506t>
- Complete lines 1 – 4 following the instructions on page 2 of the form
- Line 3: enter the non-filer's street address and zip or postal code. Use the address currently on file with the IRS (or with the US Postal Service if the IRS does not have an address on file)
- Line 7: Select the checkbox on the right-hand side for VONF
- Line 9: Year or period requested field, enter "12/31/2018"
- The non-filer must sign and date the form and enter their telephone number; only one signature is required when requesting a joint IRS VONF
- Mail or fax the completed IRS Form 4506-T to the proper address (or fax number) provided on page 2 of Form 4506-T
- If the 4506-T information is validated, non-filers can expect to receive a paper IRS VONF at the address provided on their request within 5 to 10 business days.
- Submit a copy the IRS VONF to our office; make sure to include your name and Vandal ID number on the letter