

## CalVet Tuition Fee Waiver Documentation Requirements

**Dependency** - Requirements for a child of a veteran for Plan B are a copy of the student's government-issued birth certificate, showing the veteran as a parent. The veteran named as a parent on the birth certificate must be the same person named on the VA document proving service connected disability. For example, if someone changes their name, documentation showing name change(s) are required, such as a marriage certificate or court order. A child's marital status alone will not be a bar to receiving benefits under Plan B.

For stepchildren and adoptions (status must have occurred prior to their 23rd birthday): (1) stepchild: obtain a copy of the county or government-issued marriage certificate and child's government-issued birth certificate, or (2) adopted child: a copy of the legal adoption order.

Guardianship and paternity tests are not acceptable for establishing a legal parent-child relationship for this program, only legal documents such as a government-issued birth certificate are acceptable for establishing a legal parent-child relationship. Consular Reports of births abroad issued by the United States Department of State are also acceptable. All documents provided in a foreign language must be translated into English. Document must contain all of the information needed to confirm relationship to veteran, such as dates of birth and the same names.

**Income** - Verification of Income for a student's Adjusted Gross Income (AGI) can be verified with a student-SIGNED copy of the entire tax return filed with the IRS (1040, 1040EZ) or similar FTB 540 form. In addition, if FTB or IRS tax return was electronically submitted, confirmation that the return was accepted must also be provided.

If no student SIGNED tax return is available, the student can request a tax "Return Transcript" that verifies AGI or "Verification of Non-filing" from the IRS and FTB by visiting a local IRS or FTB office, calling the IRS at 1-800-829-1040 or the FTB at 1-800-852-5711, or submitting an IRS Form 4506-T. If the form is completed correctly, request will be processed within 10 business days. Note: there are several different transcripts the IRS has available, ONLY the tax "RETURN TRANSCRIPT" (option 6a on the 4506-T) will be accepted. The tax "Return Transcript"/Non-filing verification letters must be dated after the IRS tax deadline of the current calendar year.

Form W-2 will not be accepted as proof of AGI, however, when a student is married and a joint tax return was submitted you should use ALL the W-2's for both parties to determine individual share of the joint income. Note: total wages reported on the joint tax return must be verified via ALL W-2 forms from both the student and spouse (i.e., wage amount(s) on ALL W-2 forms must total the total wage amount reported on the joint tax return).

In cases where the DVS 40 reports \$0 AGI, and \$0 Value of Support, a certified statement must be completed which states how the student can afford to attend college and support themselves. Form 1040 or FTB 540 that reports \$0.0 income does not substitute for the verification of non-filing.