



2019-2020 Verification Worksheet Dependent Student

FORM V1
Dependent

Your FAFSA application was selected for a review process called verification. The law requires us to ask you for information prior to awarding federal aid. In this process, UTPB will be comparing information provided on this form, and possibly other requested documents, with the information you provided on your Free Application for Federal Student Aid (FAFSA). If there are any differences, your FAFSA information may be corrected by this office. Students selected for verification will not be eligible for federal aid until a completed package is submitted. **Please complete all required sections of this form. Failure to complete any of the required sections make cause delays in the processing of financial aid.**

A. Student Information

Last Name	First Name	M.I.	Social Security Number
Address (include apt. no.)		Date of Birth	
City	State	Zip Code	Email Address
Home Phone (include area code)	Cell Phone (include area code)	UTPB ID# (if known)	

B. Number in Household

- List below the people in your household that your parents will support between **July 1, 2019** and **June 30, 2020**
- Include yourself, parents, siblings, or others who live with you, for whom **your parents** will provide more than **50%** of their support. (This may include children who do not reside in the household) between **July 1, 2019** and **June 30, 2020**
- List anyone in your household who will be, or is currently attending college at least half-time in a degree or diploma program at a postsecondary educational institution.

Full Name	Age	Relationship	College/University	Enrolled at least half-time (Y/N)
		<i>Self</i>	<i>UTPB</i>	

IRS Tax Return Options

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2017 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

If the student and spouse filed separate 2017 IRS income tax returns, the IRS DRT cannot be used and the **2017 IRS Tax Return Transcript(s)** must be provided for each. Student can request a transcript by calling 1-800-908-9946. Transcripts will arrive by mail within 5-10 business days. Students can also obtain a transcript at www.irs.gov, under the tools heading, click "Get a tax transcript." Click "Get Transcript **ONLINE.**" Make sure to request the "IRS Tax Return Transcript and **NOT** the "IRS Tax Account Transcript." Or under the Tools heading, click "Get a tax transcript." Click "Get Transcript by **MAIL.**" Make sure to request the "IRS Tax Return Transcript and **NOT** the "IRS Tax Account Transcript."

C. Student Income Section

Important Note: If you filed, or will file an amended 2017 IRS tax return, UTPB Financial Aid will also require that you submit a **Tax Account Transcript along with the Tax return Transcript.**

Did you, the student, file taxes for the 2017 year?

Yes. Complete accompanying Section. →

No. Skip to Section D

Do not return this worksheet without an Official 2017 Tax Transcript attached, if this was the option you selected.

Student Tax return Filers-Complete this section if you filed or will file a 2017 Tax return. Check the option below that you will use to supply tax information

I, the student, have used the *IRS Retrieval Tool* used to transfer my information and submitted the corrected FAFSA for processing. Please tell us what date you completed this step. ____/____/____

I, the student, am unable or choose not to use the *IRS Retrieval Tool*, and **I will submit a 2017 IRS Tax Return Transcript.** Copies of the Tax return are not acceptable forms for verification purposes.

D. Student Tax Return Non-Filers: Complete this section if the student will not file/not required to file a 2017 IRS Tax Return

I, the student, was **NOT** employed and had no income earned from work in 2017.

I, the student was employed in 2017. List below the names of employers, the amount earned from working, and whether an IRS W-2 form was provided. **Please provide copies of all 2017 IRS W-2 forms issued.** List every employer even if the employer did not issue a W-2 form. **The student will need to request a "Verification of Non-filing Letter" from the IRS.**

Employer Name	2017 Amount Earned	IRS W2 Provided
<i>(example) ABC's Auto Body Shop</i>	<i>\$4,500</i>	<i>Yes</i>

E. Parent Income Section

Important Note: If you filed, or will file an amended 2017 IRS tax return, UTPB Financial Aid will also require that you submit a **Tax Account Transcript along with the Tax return Transcript.**

Did you, the parent, file taxes for the 2017 year?

Yes. Complete accompanying Section →

No. Skip to Section F

Do not return this worksheet without an Official 2017 Tax Return Transcript, if this was the option you selected

Parent Tax return Filers-Complete this section if you filed or will file a 2017 Tax return. Check the option below that you will use to supply tax information

I, the parent, have used the *IRS Retrieval Tool* used to transfer my information and submitted the corrected FAFSA for processing. Please tell us what date you completed this step. ____/____/____

I, the parent, am unable or choose not to use the *IRS Retrieval Tool*, and **I will submit a 2017 IRS Tax Return Transcript.** Copies of the Tax return are not acceptable forms for verification purposes.

Students/Parents who are unable to link or choose not to use the IRS Retrieval Tool will be required to submit a 2017 Tax Transcript from the IRS. Students and Parents can order transcripts by calling 1-800-908-9946. Transcripts will arrive by mail **within 5-10 business days.** Students can also obtain a transcript at www.irs.gov, under the tools heading, click "Get a tax transcript." Click "Get Transcript **ONLINE.**" Make sure to request the "IRS Tax Return Transcript and **NOT** the "IRS Tax Account Transcript." Or under the Tools heading, click "Get a tax transcript." Click "Get Transcript by **MAIL.**" Make sure to request the "IRS Tax Return Transcript and **NOT** the "IRS Tax Account Transcript."

Student Name: _____

SSN# _____

F. Parent Tax Return Non Filers: Complete this section if the parent(s) will not file/not required to file a 2017 IRS Tax Return

I, the parent, was employed in 2017. List below the names of employers, the amount earned from working, and whether an IRS W-2 form was provided. **Please provide copies of all 2017 IRS W-2 forms issued. Also, you will need to request a "Verification of Non-filing Letter" from the IRS.**

Employer Name	2017 Amount Earned	IRS W2 Provided
<i>(example) ABC's Auto Body Shop</i>	<i>\$4,500</i>	<i>Yes</i>

Neither parent was employed nor had income earned from work in 2017, and one or both parents had money paid on their behalf or received untaxed income to support the household

If you selected the last option you MUST complete the student section of the LOW INCOME VERIFICATION FORM. This form records amounts of monies received to cover the cost of living. This form is not included with this worksheet, to print this form you must go to ss.utpb.edu/financial-aid/ and click on verification on the left side tool bar. Failure to include this form may cause delays in the processing of your financial aid.

Request for Verification of Non-Filing Letter

Online Request

- Follow the directions above "Requesting a Tax Return Transcript" to step 3 where you will choose "get transcript online" (read carefully to make sure you have everything needed to complete the process online).
- Instead of choosing "Tax Return Transcript", choose "Verification of Non-filing Letter".
- You cannot choose "get transcript by mail" for a Verification of Non-filing Letter you must instead follow the directions below to have your VONF mailed to you.

Paper Request

- Download the IRS Form 4506T at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
- Print form off and complete lines 1-4. On line 7, check the box to indicate you would like to receive a Verification of Non-Filing, proof that you did not file a return for the year.
- On line 9 indicate the ending date on the year or period. For 19-20 verification the date should be 12/31/2017.
- Mail or fax the form to the correct location based on where you live. Use 2nd Page of 45067T to determine this address or fax number.
- The Verification Letter of Non-Filing will be mailed to you within 10 business days.

G. Certification and Signature

I certify that all of the information reported on this worksheet is completed and correct. Signatures from the student and at least one parent whose information was used on the FAFSA are required.

Student Signature

Date

WARNING: If you purposely give false or misleading information, you may be fined, sentenced to jail, or both.

Parent Signature

Date