



**Office of Financial Aid & Scholarships**

**2024-2025 Verification Worksheet**

**Form V5**

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. 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. **Documents received after priority deadline do not guarantee that aid will be available before classes begin and it is recommended that you sign up for a payment plan to hold your classes until your financial aid is processed.**

**Fall Priority Deadline: July 15, 2024**  
**Spring Priority Deadline: October 15, 2024**

**A. Student Information**

_____	_____	_____	_____
Last Name	First Name	M.I.	Social Security Number
_____	_____	_____	_____
Home Phone (include area code)	Cell Phone (include area code)	UTPB student ID	

**B. Household size: select ONE dependency status below & list household members as indicated**

**1. Select ONE dependency status below that corresponds to your answers on the FAFSA**

- Dependent student – answered “No” to all Dependency Status questions on the FAFSA**  
List everyone in your parents’ household for whom they will provide more than half of their monetary support from July 1, 2024 through June 30, 2025, including:
- Yourself;
  - Your parents (including a stepparent);
  - Your parent’s (and stepparent’s) other children, even if they don’t live with your parents; and
  - Other people, if they now live with your parents, and your parents provide more than half of their support and will continue to provide that support

- Independent student – answered “Yes” to one or more Dependency Status questions on the FAFSA**  
List everyone in your household for whom you will provide more than half of their monetary support from July 1, 2024 through June 30, 2025, including:
- Yourself;
  - Your spouse, if married;
  - Your children, even if they do not live with you; and
  - Other people, if they now live with you, and you will continue to provide their support

**2. List all household members specified in the applicable list above.**

Include the college name for any household member who will be enrolled at least half time at an eligible postsecondary educational institution any time between July 1, 2024 and June 30, 2025. Do not include dual credit. Dependent students do not include parent’s college information. Attach additional page if necessary.

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

## 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](http://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 2022 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 the student and spouse filed separate 2022 IRS income tax returns**, the IRS DRT cannot be used and the 2022 IRS Tax Return Transcript(s) must be provided for each. Students 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](http://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. Tax filers only: Only complete this section if you/your parents filed a 2019 IRS tax return

**Important Note:** If you filed, or will file an amended 2022 IRS tax return, UTPB Financial Aid will also require that you submit a **2022 Tax Return Transcript and an Amended U.S. Individual Income Tax Return(1040X)**.

#### Independent/Dependent students

- I, the student (and /or my spouse), have **used the IRS Data Retrieval Tool** and successfully transferred my 2022 tax information.
- I, the student, (and /or my spouse), am unable or choose not to use the *IRS Retrieval Tool*, and **I will submit a 2022 IRS Tax Return Transcript or signed copy of the 2022 income tax return and applicable schedules.**

#### Dependent students only

- I, the parent, have **used the IRS Data Retrieval Tool** and successfully transferred my 2022 tax information.
- I, the parent, am unable or choose not to use the *IRS Retrieval Tool*, and **I will submit a 2022 IRS Tax Return Transcript or signed copy of the 2022 income tax return and applicable schedules.**

### Non-Tax filers only Complete this section if you/your parents will not file or are not required to file a 2022 IRS tax return

#### Independent/Dependent students

- I, the student (and /or my spouse) was NOT employed and had no income earned from work in 2022. **Both the student (and/ or your spouse) will need to request a "Verification of Non-filing Letter" from the IRS.**
- I, the student (and/or my spouse) was employed in 2022 and was not required to file. **Both the student (and/or your spouse) will submit copies of all of 2022 IRS W-2 forms or a 2022 wage and tax transcript and request a "Verification of Non-Filing Letter" from the IRS.**

#### Dependent students only

- I, the parent, was employed in 2019 and was not required to file. **The parent will submit copies of all 2022 IRS W2 forms or a wage and tax transcript and request a "Verification of Non-Filing Letter" from the IRS.**
- I, the parent, was NOT employed and had no income earned from work in 2022. **The parent will need to request a "Verification of Non-Filing Letter" from the IRS.**

Employer Name	2022 Amount Earned
<i>(example) ABC's Auto Body Shop</i>	<i>\$4,500</i>

**If you are a non-tax filer you MUST complete the LOW INCOME VERIFICATION FORM. This form details the breakdown of your 2022 expenses and amounts of monies received to cover them. This form is not included with this worksheet, to print this form you must go to <https://www.utpb.edu/admissions-aid/financial-aid/financial-aid-forms>. Failure to include this form may cause delays in the processing of your financial aid.**

#### Request for Verification of Non-Filing Letter

##### Paper Request

1. Download the IRS Form 4506Tat <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.
2. 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.
3. On line 9 indicate the ending date on the year or period. For 24-25 verification the date should be 12/31/2022.
4. Mail or fax the form to the correct location based on where you live. Use 2<sup>nd</sup> Page of 45067T to determine this address or fax number.
5. The Verification Letter of Non-Filing will be mailed to you within 10 business days.

D. Verification of High School completion/ Identity & Statement of Educational Purpose

**Identity and Statement of Educational Purpose**

The student must appear in person at *University of Texas Permian Basin* (or in front of a notary, see next page) to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID. In addition, the student must sign, in the presence of the institutional official (or in front of a notary, see next page), the Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing  
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending at University of Texas Permian Basin for 2024–2025.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

**Office use only**

Verified documentation for H.S. completion is in image or is attached

Date stamp all documents

**In Person**

**Used Notary – Received via Mail**

- Verified Government Issued Photo ID is legitimate, is the likeness of the person presenting it, and made a copy of photo id
- Witnessed student signing form

- Received Notary's Certificate of Acknowledgement with WET signatures
- Copy of Student's government issued Photo ID

Staff Signature: \_\_\_\_\_

Date: \_\_\_\_\_

E. Certification and Signature

I certify that all of the information reported on this worksheet is completed and correct. Both student and parent signatures are required for dependent students.

\_\_\_\_\_  
Student signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent signature

\_\_\_\_\_  
Date

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

Use this page only if you are unable to appear in person at the University of Texas Permian Basin for Verification of Identity & Statement of Educational Purpose. The University must receive wet signatures of student and notary- in other words, electronic or typed signatures are not acceptable.

**Notary's Certificate of Acknowledgement  
For Verification of Identity and Statement of Educational Purpose**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_

Date

Notary's Name

Personally appeared \_\_\_\_\_ and proved to me on basis of satisfactory evidence of

Printed name of Signer

identification, \_\_\_\_\_, to be the above named person who signed the

foregoing instrument. Type of government-issued Photo ID provided

**WITNESS my hand and official seal**

(SEAL)

\_\_\_\_\_  
Notary Signature

\_\_\_\_\_  
Commission expiration date