

2026-2027 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 may 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, 2026
Spring Priority Deadline: October 15, 2026

A. Student Information

Last Name

First Name

M.I.

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, 2026 through June 30, 2027, 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, 2026 through June 30, 2027, 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, 2026 and June 30, 2027. 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

C. Tax filers only: Only complete this section if you/your parents filed a 2024 IRS tax return

Important Note: If you filed, or will file an amended 2024 IRS tax return, UTPB Financial Aid will also require that you submit a **2024 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 Direct Data Exchange** and successfully transferred my 2024 tax information.
- ☐ I, the student, (and /or my spouse), am unable to use the *Direct Data Exchange*, and **I will submit a 2024 IRS Tax Return Transcript or signed copy of the 2024 income tax return and applicable schedules.**

Dependent students only

- ☐ I, the parent, have **used the Direct Data Exchange** and successfully transferred my 2024 tax information.
- ☐ I, the parent, am unable to use the *Direct Data Exchange*, and **I will submit a 2024 IRS Tax Return Transcript or signed copy of the 2024 income tax return and applicable schedules.**

IRS Tax Return Options

In some cases, an individual may be asked to manually provide income and tax information on the FAFSA form. Manually entered data will be used in the SAI calculation but is not considered verified information for verification purposes and supporting documentation will be requested.

Ways to get transcripts

- You may register to use Individual Online Account to view, print, or download an IRS Tax Return Transcript.
- If you're unable to register, or you prefer not to use Individual Online Account, you may order an IRS Tax Return Transcript through [Get transcript by mail](https://www.irs.gov/individuals/get-transcript) (www.irs.gov/individuals/get-transcript) or by calling the phone transcript service at 1-800-908-9946.

*Please allow 5 to 10 calendar days for delivery.

*Make sure to request the "IRS Tax Return Transcript and NOT the "IRS Tax Account Transcript."

Non-Tax filers only: Only complete this section if you/your parents will not file or are not required to file a 2024 IRS tax

Independent/Dependent students

- ☐ I, the student (and /or my spouse) was NOT employed and had no income earned from work in 2024. **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 2023 and was not required to file. **Both the student (and/or your spouse) will submit copies of all of 2024 IRS W-2 forms or a 2023 wage and tax transcript and request a "Verification of Non-Filing Letter" from the IRS.**

Dependent students only

- ☐ I, the parent, was employed in 2024 and was not required to file. **The parent will submit copies of all 2024 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 2024. **The parent will need to request a "Verification of Non-Filing Letter" from the IRS.**

If you are a non-tax filer you must complete the low-income verification form. This form provides a summary of your 2024 expenses and the corresponding funds received to cover them. This form is not included with this worksheet, and will be provided by the verification officer during processing.

Request for verification of non-filing letter

Follow instructions below to request a Verification of non-filing letter:

1. Download the current revision of IRS Form 4506T [online](https://www.irs.gov/forms-pubs/about-form-4506-t) (www.irs.gov/forms-pubs/about-form-4506-t)
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 26-27 verification the date should be 12/31/2024.
4. 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.
5. The Verification Letter of Non-Filing will be mailed to you within 10 business days.

D. Verification of Identity

Verification of Identity

This form is used to verify the identity of individuals as required by the V5 Verification process. Please complete the form and select one of the verification options below.

☐ **Option 1 – In-Person Verification at Our Office**

- Present a **verified government-issued photo ID** (e.g., driver's license, passport).
- A **copy of the document** will be made for verification records.
- **Wet signatures** are required.
- Verification will be completed by an authorized representative of our Financial Aid Department.

☐ **Option 2 – Verification by Public Notary**

- Email verification@utpb.edu to request a Notary Certificate of Acknowledgement for Verification of Identity
- Present a **verified government-issued photo ID** to a **licensed notary public**.
- The notary will verify **the ID** and witness your **wet signature**.
- The University must receive **wet signatures of student and notary**, in other words, **electronic or typed signatures are not acceptable**.
- The notary's certification must be included in your submission.

☐ **Option 3 – Online Verification via Microsoft Teams Call**

- Email verification@utpb.edu to request a Teams call meeting
- Present your **verified government-issued photo ID** during a **live Teams call** with an authorized representative.
- The representative will visually verify the ID and record confirmation of identity.

E. Certification and Signature

I certify that all of the information reported on this worksheet is completed and correct.

Student Signature

Date

Parent Signature (for Dependent Students only)

Date

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

For office use only

Option 1 – In-Person Verification at Our Office

☐ 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

Option 2 – Verification by Public Notary

☐ Received Notary's Certificate of Acknowledgement with WET signatures & copy of ID.

Option 3 – Online Verification via Microsoft Teams Call

☐ Verified Government Issued Photo ID is legitimate, is the likeness of the person presenting it and took photograph.

Official Signature: _____