

|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|

Your 2022–2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Federal regulations require this institution to verify the information you reported on your FAFSA with the information reported on this worksheet. If there are differences, we may be required to correct your FAFSA information. Failure to submit this information will prohibit your federal aid from disbursing to your student account.

You must complete and sign this worksheet and submit the form to the Office of Student Financial Services. If requested, you may be asked to submit additional information. For questions regarding verification, contact the Office of Student Financial Services as soon as possible to avoid processing delays.

**Submit forms using ONE of the following methods:**

1. **Online:** Log on to **myUTH**, click on the **To Do List Item**, select **Submit** button and follow instructions.
2. **In Person:** UCT Building, 7000 Fannin, Suite 2220, Houston, TX 77030

## COMPLETE ALL SECTIONS

|   |            |          |                                |
|---|------------|----------|--------------------------------|
| Student Last Name                         | First Name | M.I.     | Student Date of Birth          |
| Student Street Address (include apt. no.) |            |          | Student Email                  |
| City                                      | State      | Zip Code | (    )<br>Student Phone Number |

## A. FAMILY INFORMATION

List below the people in the student's household.

Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2022, through June 30, 2023, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2023.

Number in College: Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2022, and June 30, 2023, and include the name of the college.

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|---------|---|
|           |     | <i>Self</i>  |         |   |
|           |     |              |         |   |
|           |     |              |         |   |
|           |     |              |         |   |

If more space is needed, provide a separate page with the student's name and ID number at the top.

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

## B. STUDENT FILING STATUS

**Has the student and/or spouse filed or intend to file a 2020 income tax return with the IRS?**

Check the box that applies:

**NO.** Proceed to Sections C and E

**YES.** Skip to Sections D through E

Student Name \_\_\_\_\_  
Last First M.I.

Student ID: 

|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|

### C. STUDENT TAX NON-FILER

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and/or spouse will not file AND are not required to file a 2020 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2020.
- The student and/or spouse were employed in 2020, were not required to file taxes and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. **Provide copies of all 2020 IRS W-2 forms or equivalent documents issued to the student and spouse by their employers.**

| Employer's Name                                | IRS W-2 or Equivalent Document Provided? | Annual Amount Earned in 2020 |
|--|--|------------------------------|
| <i>(Example) ABC's Auto Body Shop</i>          | Yes                                      | \$4,500.00                   |
|  |  |                              |
|  |  |                              |
|  |  |                              |
| <b>Total Amount of Income Earned From Work</b> |  | <b>\$</b>                    |

If more space is needed, provide a separate page with the student's name and ID number at the top.

Per federal guidelines, *independent* students and their *spouse*, if married, that *did not file* a 2020 income tax return are *required* to submit a Verification of Nonfiling Letter (VNF) from the IRS or other relevant tax authority dated on or after October 1, 2021. Please complete the appropriate section below.

- IRS Verification of Nonfiling Letter is provided.
- I attest that I attempted to acquire the Verification of Nonfiling Letter from the IRS or other relevant tax authority and was unable to obtain the required documents for the follow reason:

Reason MUST be provided if VNF or other tax authority document is not provided

### D. STUDENT TAX FILER

**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

**Instructions:** Complete this section if the student and spouse filed or will file a 2020 IRS income tax return(s).

The best way to verify income is by using the [IRS Data Retrieval Tool](#) (IRS DRT) that is part of *FAFSA on the Web* at [FAFSA.gov](#). In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the [IRS DRT](#) if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2020 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules.**

If the student and spouse filed separate 2020 IRS income tax returns, the IRS DRT cannot be used. **The 2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules must be provided for each.**

### E. CERTIFICATION AND SIGNATURES

Each person signing below certifies that all of the information reported is complete and correct and acknowledges the receipt of the Verification of 2020 Income for Tax Filers disclosure which contains IRS DRT recommendations and information for individuals with unusual tax filing circumstances.

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

\_\_\_\_\_  
Student Signature REQUIRED (*no electronic signatures accepted*)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (Optional)

\_\_\_\_\_  
Date

## Verification of 2020 Income for Tax Filers

### IRS Data Retrieval Tool

The best way to verify income is by using the [IRS Data Retrieval Tool](#) (IRS DRT) that is part of *FAFSA on the Web* at [FAFSA.gov](#). In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

### To obtain a 2020 IRS Tax Return Transcript

- **Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

### Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2020 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2020, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2020;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2021 or a signed statement certifying the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2020 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2020.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2020 tax account information.

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2020 must provide a signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return; or
- A **2020 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2020 IRS Form 1040 and applicable schedules that were filed with the IRS.

### Individuals Who Were Victims of IRS Tax-Related Identity Theft

- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2020 income tax return and applicable schedules the individual filed with the IRS; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

### Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.