



Independent

2017-2018 Verification Worksheet

Your financial aid application has been selected for further review. We will be comparing your FAFSA information with information you provide on this form and with tax information that you submitted to the IRS. The university has the right to review this information prior to awarding federal aid (34 CFR, Part 668). If corrections are necessary, we will update your FAFSA information and send you a revised offer of financial aid indicating any changes in aid eligibility.

Student Name: UO ID:

Complete sections A and B of this worksheet. The student must also sign and date page 2.

Return this form to the Office of Student Financial Aid and Scholarships within 30 days. Certain funds are limited. Even if you meet our FAFSA priority deadline of March 1st, you may lose priority funding if verification documents are not supplied to our office in a timely manner.

Additional instructions for tax related documents are provided on page 3. Please include the student's name and UO ID on all documents provided.

A. Family Information

List the people in your household. Include:

- a. **Yourself,**
- b. **Your spouse,**
- c. **Your children,** if you will provide more than half of their support from July 1, 2017 – June 30, 2018,
- d. **Other people** who live with and will receive more than half of their support from you from July 1, 2017 – June 30, 2018

List the names of all household members below and indicate whether or not the household member will be attending college at least half-time during the 2017-2018 academic year. Attach a separate sheet if you need additional space.

| Full Name | Age | Date of Birth | Relationship to Student | College (if applicable) |
|-----------|-----|---------------|-------------------------|-------------------------|
| | | | Self | University of Oregon |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Last Name: _____

UO ID: _____

B. Independent Student's* Income Information

Did the student* file a 2015 IRS income tax return? If yes, complete section B-1. If no, complete section B-2.

B-1. Income Information (Tax Filer)

Check only one box:

The student's **2015 IRS Tax Return Transcript** is attached to this worksheet. *For instructions on how to obtain this document from the IRS, see page 4.*

A copy of the student's **signed 2015 IRS Tax Return (e.g. 1040)** is attached to this worksheet.

B-2. Income Information (Non-Tax Filer)

Check only one box:

The student had **no income, will not file, and was not required to file** a 2015 IRS income tax return.

The student was **employed in 2015, but will not file, and was not required to file** a 2015 IRS income tax return. The following are attached:

- All 2015 **IRS W-2 forms**;
- List below the names of all of the student's employers and the amount earned from each employer in 2015.

| Employer's name | Amount earned in 2015 | IRS W-2 Attached? |
|---------------------------------|-----------------------|-------------------|
| Suzy's Auto Body Shop (example) | \$2000.00 (example) | Yes (example) |
| | | |
| | | |

Submit all required verification documents within 30 days.

***Important Note: if the student is married, they must include income information for both student and spouse.**

By signing this worksheet, I certify that all the information reported is complete and correct. I understand that I may lose consideration for limited funds if I do not submit all verification documents in a timely manner.

Student Signature

Date

Spouse Signature (if applicable)

Date

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

Instructions for Tax Related Documents

Tax Filers:

Options for obtaining an IRS Tax Return Transcript

Important Note: The instructions below apply to each tax filer. If parents filed separate tax returns for 2015, you will need to provide an IRS Tax Return Transcript for each of them.

- **Online Request** - Go to www.irs.gov/transcript, and then choose either “Get Transcript Online” or “Get Transcript by Mail.” Get transcript online will give you instant delivery via PDF whereas get transcript by mail will mail you a copy to be received within 5-10 days. Make sure to request the 2015 IRS Tax Return Transcript and NOT the 2015 IRS Tax Account Transcript.
- **Telephone Request** - 1-800-908-9946, after following prompts, select option 2 to request a Tax Return Transcript (NOT Tax Account Transcript) and then enter “2015.”
- **Paper Request Form** - [IRS Form 4506T-EZ](#) – complete the paper form and submit it to the IRS as instructed, being sure to use the correct fax number or address for your state of filing.

Amended Tax Returns (uncommon): Tax filers who have amended their 2015 IRS tax return (e.g. corrections made to your 2015 tax return using Form 1040X) must send our office a copy of their 2015 IRS Tax Return Transcript (see instructions above) or a signed 2015 IRS Tax Return (e.g. 1040); and a signed copy of the 2015 IRS Form 1040X that was filed with the IRS.

Victims of IRS Identity Theft (uncommon): Tax filers who are unable to obtain a tax return transcript or use the DRT due to IRS Identity Theft must request a Tax Return DataBase View Transcript (TRDBV) by calling the IRS at 1-800-908-4490; and must also submit to our office a signed and dated statement indicating that they were victims of tax-related identity theft and that the IRS has been made aware of it.