



2024-2025 Verification Worksheet

Student Name: \_\_\_\_\_ UO ID: \_\_\_\_\_

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

The University of Oregon has a FAFSA priority deadline of March 1 (April 1 for 2024-2025). Certain funds are limited, so failure to supply our office with the verification documents requested in a timely manner may result in loss of priority funds.

Complete Sections A, B, and C of this worksheet and sign Page 3. Please include the student's name and UO ID on all documents provided. Please use black ink (NOT pencil) to complete and sign this worksheet.

Verification documents must be submitted to the Office of Student Financial Aid and Scholarships within 30 days of request.

A. Family Size

List the people in your parents' family size. Include:

- a. Yourself (the student)
b. Your parent(s) listed on the FAFSA (including a step-parent)
c. Your parent(s)' other children, if
i. they live with your parents (or live apart because of college enrollment); and
ii. they will receive more than half of their support from your parents; and
iii. your parents will continue to provide more than half of their support from 7/1/2024 - 6/30/2025
d. Other people
i. who live with your parents; and
ii. they will receive more than half of their support from your parents; and
iii. your parents will continue to provide more than half of their support from 7/1/2024 - 6/30/2025

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return. As a result, the parent should not include any unborn children in the family size. List the names and information of all family members in the table below. Attach a separate sheet if you need additional space.

Table with 3 columns: Full Name, Age, Relationship to Student. Includes a row for 'Self' and several empty rows for other family members.

Last Name: \_\_\_\_\_

UO ID: \_\_\_\_\_

## B. Student Income Information

Complete either Section B-1 OR Section B-2 below. Only ONE box should be checked on this page.

**Did the student file a 2022 IRS Income Tax Return?**

If YES, complete **Section B-1 only**.

If NO, skip Section B-1 and complete **Section B-2 only**.

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### B-1. Student's Income Information (2022 Tax Filer)

Check only **ONE** box:

<input type="checkbox"/>	The student's <b>2022 IRS Tax Return Transcript</b> (NOT the tax account transcript), is attached to this worksheet. <i>For instructions on how to obtain the IRS Tax Return Transcript, see page 4.</i>
<input type="checkbox"/>	The student's <b>signed 2022 IRS Income Tax Return Form 1040</b> and <b>Schedules 1-3</b> (if filed) are attached to this worksheet. <i>By providing this document, you attest that the return was submitted to the IRS.</i>
<input type="checkbox"/>	The student's 2022 IRS Tax information was transferred over to the FAFSA application automatically with the direct data exchange with the IRS ( <b>FA-DDX</b> ) and no manual tax information was entered on the FAFSA.

----- **OR** -----

### B-2. Student's Income Information (Non-Tax Filer)

Check only **ONE** box:

<input type="checkbox"/>	The student had <b>no income, will not file, and was not required to file</b> , a 2022 IRS Income Tax Return.								
<input type="checkbox"/>	The student was <b>employed in 2022, but will not file, and was not required to file</b> , a 2022 IRS Income Tax Return. Please submit the following: <ul style="list-style-type: none"><li>• All 2022 <b>IRS W-2 forms</b>.</li><li>• List below the names of all of the student's employers and the amount earned from each employer in 2022.</li></ul> <table border="1"><thead><tr><th>Employer's name</th><th>Amount earned in 2022</th></tr></thead><tbody><tr><td>Suzy's Auto Body Shop (example)</td><td>\$2000.00 (example)</td></tr><tr><td> </td><td> </td></tr><tr><td> </td><td> </td></tr></tbody></table>	Employer's name	Amount earned in 2022	Suzy's Auto Body Shop (example)	\$2000.00 (example)				
Employer's name	Amount earned in 2022								
Suzy's Auto Body Shop (example)	\$2000.00 (example)								

Last Name: \_\_\_\_\_

UO ID: \_\_\_\_\_

**C. Parent Income Information – parent(s) listed on page 1**

Complete either Section C-1 OR Section C-2 below. Only ONE box should be checked on this page.

**Did the parent(s) file a 2022 IRS income tax return?**

If YES, complete **Section C-1 only**.

If NO, skip Section C-1 and complete **Section C-2 only**.

**C-1. Parent(s)' Income Information: 2022 Tax Filer**

**Check only ONE box:** \*if parents listed on FAFSA filed separate returns, you will need to provide tax information for both parents.

<input type="checkbox"/>	The parent(s)' <b>2022 IRS Tax Return Transcript</b> (NOT the tax account transcript) is attached to this worksheet. <i>For instructions on how to obtain the 2022 tax return transcript, see page 4.</i>
<input type="checkbox"/>	The parent(s)' <b>signed 2022 IRS Income Tax Return Form 1040</b> and <b>Schedules 1-3</b> (if filed) are attached to this worksheet. <i>By providing this document, you attest that the return was submitted to the IRS.</i>
<input type="checkbox"/>	The parent(s)' 2022 IRS Tax information was transferred over to the FAFSA application automatically with the direct data exchange with the IRS ( <b>FA-DDX</b> ) and no manual tax information was entered on the FAFSA.

**OR**

**C-2. Parent(s)' Income Information: 2022 Non-Tax Filer**

**Check only ONE box:** \*if non-filing of foreign income tax returns please see additional instructions on page 4 (uncommon)

<input type="checkbox"/>	The parent(s) had <b>no income, will not file, and were not required to file</b> , a 2022 IRS income tax return.								
<input type="checkbox"/>	The parent(s) were <b>employed in 2022, but will not file, and were not required to file</b> , a 2022 IRS Income Tax Return. Please submit the following: <ul style="list-style-type: none"> <li>All 2022 <b>IRS W-2 forms</b>.</li> <li>List below the names of all of the parent(s)' employers and the amount earned from each employer in 2022.</li> </ul> <table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 60%;">Employer's Name</th> <th style="width: 40%;">Amount Earned in 2022</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Suzy's Auto Body Shop (example)</td> <td style="text-align: center;">\$2000.00 (example)</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Employer's Name	Amount Earned in 2022	Suzy's Auto Body Shop (example)	\$2000.00 (example)				
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Suzy's Auto Body Shop (example)	\$2000.00 (example)								

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.

**Typed or auto-generated electronic signatures NOT accepted.**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

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

# Instructions for Tax Related Documents

## 2022 Tax Filers:

### Direct IRS Transfer when completed the FAFSA

**Important Note:** As part of federal student aid eligibility, students, and parent(s), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and parent(s) filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS. If 2022 income tax return information for the student or parent(s) was not available or could not be used, provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.

### 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 2022, you will need to provide an IRS Tax Return Transcript for each of them.

- **Online Request** - Go to [www.irs.gov/transcript](http://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 2022 IRS Tax Return Transcript and NOT the 2022 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 "2022."
- **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.

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## Parent Non-Tax Filers (for non-IRS tax authority):

**(Uncommon)** Provide verification of non-filing for individuals who would file a return with a relevant tax authority **other than the IRS** dated on or after October 1, 2023 (e.g. foreign income tax return).

**Note:** If the parent has made a good faith attempt to obtain verification of non-filing, but is unable to obtain a verification/confirmation of non-filing from the relevant tax authority other than the IRS, the school may accept as a replacement for the verification/confirmation of non-filing a signed statement certifying that the individual attempted to obtain the verification/confirmation of non-filing from the relevant tax authority and was unable to obtain it.

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**Amended Tax Returns (Uncommon):** Tax filers who have amended their 2022 IRS tax return (e.g. corrections made to your 2022 tax return using Form 1040X) must send our office a signed copy of their 2022 IRS Tax Return Form 1040 and Schedules 1-3 (if filed), 2022 IRS Tax Return Transcript, or unaltered tax information directly transferred from the IRS (FA-DDX); and a signed copy of the 2022 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 FA-DDX due to IRS Identity Theft must send our office a signed copy of their 2022 IRS Tax Return Form 1040 and Schedules 1-3 (if filed) or 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.

**IRA Rollover (Uncommon):** If you reported an IRA rollover on your 2022 IRS tax return, please provide a signed copy of your 2022 IRS Income Tax Return Form 1040 and Schedules 1-3 (if filed) clearly indicating there was a "rollover," as that information does not display on the Tax Return Transcript or from the direct data exchange with the IRS (FA-DDX).

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Office of Student Financial Aid and Scholarships

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