



## 2026-2027 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. 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 and B of this worksheet and sign Page 2.**  
**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 family size. Include:

- a. **Yourself** (the student)
- b. **Your Spouse** (if applicable)
- c. **Your Dependent Children**
  - i. who live with you (or live apart because of college enrollment); and
  - ii. you provide more than half of their support; and
  - iii. you will continue to provide more than half of their support from July 1, 2026 – June 30, 2027
- d. **Other People**
  - i. who live with you; and
  - ii. you provide more than half of their support; and
  - iii. you will continue to provide more than half of their support from July 1, 2026 – June 30, 2027

The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the student could claim as a dependent on a U.S. tax return. As a result, the student 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.

Full Name	Age	Relationship to Student
		Self

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 2024 IRS Income Tax Return?**

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

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

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

### B-1. Student's Income Information (2024 Tax Filer)

Check only one box:

☐

**Already provided directly from IRS when completed FAFSA:** As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form. If that transfer was unsuccessful please provide one of the two other options below:

☐

The student's **2024 IRS Tax Return Transcript** (NOT the tax account transcript), is attached to this worksheet. *For instructions on how to obtain the IRS Tax Return Transcript, see page 3.*

☐

The student's **signed 2024 IRS Income Tax Return Form 1040** and **Schedules C & 1-3** (if filed) are attached to this worksheet.

*By providing this document, you attest that the return was submitted to the IRS.*

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

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

Check only one box:

☐

The student had **no income, will not file, and was not required to file**, a 2024 IRS Income Tax Return.

☐

The student was **employed in 2024, but will not file, and was not required to file**, a 2024 IRS Income Tax Return. Please submit the following:

- All 2024 **IRS W-2 forms (or equivalent)**.
- List below the names of all of the student's employers and the amount earned from each employer in 2024.

Employer's Name	Amount Earned in 2024
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

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

# Instructions for Tax Related Documents

## 2024 Tax Filers:

### Direct IRS Transfer when completed the FAFSA

**Important Note:** As part of federal student aid eligibility, students, and spouses (as appropriate), 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 spouse filed separate 2024 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 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2024 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 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 2024, you will need to provide an IRS Tax Return Transcript for each of them.

- **Online Request** - Go to [www.irs.gov/transcript](https://www.irs.gov/transcript), and choose either "Individual Online Account" 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 2024 IRS Tax Return Transcript and NOT the 2024 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 "2024."
- **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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**Amended Tax Returns (Uncommon):** Tax filers who have amended their 2024 IRS tax return (e.g. corrections made to your 2024 tax return using Form 1040X) must send our office a signed copy of their 2024 IRS Tax Return Form 1040 and Schedules C & 1-3 (if filed), 2024 IRS Tax Return Transcript, or unaltered tax information directly transferred from the IRS (FA-DDX); and a signed copy of the 2024 IRS Form 1040X that was filed with the IRS.

**Individuals Who Filed Non-IRS Income Tax Returns (Uncommon):** 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.

**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 2024 IRS Tax Return Form 1040 and Schedules C & 1-3 (if filed); 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, or an IRS 4674C letter (a letter from the IRS acknowledging the identify theft).

**IRA Rollover (Uncommon):** If you reported an IRA rollover on your 2024 IRS tax return, please provide a signed copy of your 2024 IRS Income Tax Return Form 1040 and Schedules C & 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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