



2020-2021 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 Information

List the people in your household. Be sure to include:

- a. Yourself (the student)
b. Your Spouse (if applicable)
c. Your Children, if you will provide more than half of their support from July 1, 2020 – June 30, 2021
d. Other People who live with you and will receive more than half of their support from you from July 1, 2020 – June 30, 2021.

List the names and information of all household members in the table below.

Indicate whether a household member will be attending college at least half-time during the 2020-2021 academic year.

Attach a separate sheet if you need additional space.

Table with 5 columns: Full Name, Age, Date of Birth, Relationship to Student, Name of College (required if applicable). Includes a pre-filled row for 'Self' at 'University of Oregon'.

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 2018 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 (2018 Tax Filer)

Check only one box:

<input type="checkbox"/>	<b>Recommended Method:</b> The student has used the <b>IRS Data Retrieval Tool</b> to transfer their 2018 IRS Income Tax Return information into the student's FAFSA. <i>For instructions, see page 3.</i>
<input type="checkbox"/>	The student's <b>2018 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 3.</i>
<input type="checkbox"/>	The student's <b>signed 2018 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>

----- **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 2018 IRS Income Tax Return. Please submit the following: <ul style="list-style-type: none"> <li>The student's <b>IRS Verification of Non-Filing Letter</b> for tax year 2018. <i>For instructions on how to obtain the IRS Verification of Non-Filing Letter, see page 3.</i></li> </ul>								
<input type="checkbox"/>	The student was <b>employed in 2018, but will not file, and was not required to file</b> , a 2018 IRS Income Tax Return. Please submit the following: <ul style="list-style-type: none"> <li>The student's <b>IRS Verification of Non-Filing Letter</b> for tax year 2018. <i>For instructions on how to obtain the IRS Verification of Non-Filing Letter, see page 3.</i></li> <li>All 2018 <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 2018.</li> </ul> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Employer's Name</th> <th style="width: 40%;">Amount Earned in 2018</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 2018	Suzy's Auto Body Shop (example)	\$2000.00 (example)				
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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. **Electronic signatures NOT accepted.**

\_\_\_\_\_  
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

## 2018 Tax Filers:

### Using the IRS Data Retrieval Tool (DRT) - (Recommended Method for Tax Filers)

- Visit [fafsa.gov](https://fafsa.gov) and log in to the student's 2020-2021 FAFSA application
- Select "Make FAFSA Corrections"
- Navigate to the Financial Information section of the Application. Follow instructions to determine if the student and/or parent(s) are eligible to use the IRS Data Retrieval Tool. Transfers of unaltered IRS data are acceptable for verification.
  - While most tax filers are able to use the DRT, some situations where you may be unable to use the DRT include: if married and filed separate tax returns or if marital status has changed after the end of the tax year.

### Options for obtaining an IRS Tax Return Transcript

**Important Note:** The instructions below apply to each tax filer. If spouses filed separate tax returns for 2018, 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 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 2018 IRS Tax Return Transcript and NOT the 2018 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 "2018."
- **Paper Request Form** - [IRS Form 4506T-EZ](https://www.irs.gov/pub/irs-soi/18506t-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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## Non-Tax Filers:

### Options for obtaining an IRS Verification of Non-Filing Letter

All non-tax filers are required to provide an IRS Verification of Non-Filing Letter dated on or after October 1, 2019 that indicates that a 2018 IRS income tax return was not filed with the IRS. After receiving the Verification of Non-Filing Letter from the IRS, include the student's UO ID, then submit to our office.

- **Paper Request Form** - [IRS Form 4506-T](https://www.irs.gov/pub/irs-soi/18506t-t) – complete lines 1-4, check the box on line 7, and indicate "12/31/2018" on line 9. Check the attestation box, sign, date, and submit it to the IRS as instructed. Mail to Utah or Ohio depending upon your state of residence.
- **Online Request** - Go to [www.irs.gov/transcript](https://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 a 2018 Verification of Non-Filing Letter.
- **Telephone Request** - 1-800-908-9946, after following prompts, select option 2 to request an IRS Verification of Non-Filing Letter and then enter "2018."

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**Amended Tax Returns (Uncommon):** Tax filers who have amended their 2018 IRS tax return (e.g. corrections made to your 2018 tax return using Form 1040X) must send our office a signed copy of their 2018 IRS Tax Return Form 1040 and Schedules 1-3 (if filed), 2018 IRS Tax Return Transcript, or unaltered DRT (see instructions above); and a signed copy of the 2018 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 send our office a signed copy of their 2018 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.

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Office of Student Financial Aid and Scholarships

1278 University of Oregon, Eugene OR 97403-1278

Phone: 541-346-3221 | Fax: 541-346-1175 | Email: [financialaid@uoregon.edu](mailto:financialaid@uoregon.edu) | [financialaid.uoregon.edu](http://financialaid.uoregon.edu)

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