



Umpqua Community College  
 Financial Aid Office  
 PO Box 967  
 Roseburg, Oregon 97470  
 541.440.4602 | 541.440.4612 (FAX)  
 FinancialAid@umpqua.edu

**2016-2017  
 Verification Worksheet  
 INDEPENDENT**

Your 2016-2017 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that, before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete and sign this verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

**How To Order A Tax Return Transcript**

1. Online Request – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click “Get A Tax Transcript.” Click “Get Transcript By Mail.” Be sure to request the “**IRS Tax Return Transcript**” and **NOT** the “IRS Tax Account Transcript.”
2. Telephone Request – 1-800-908-9946
3. Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

**A. Student Information**

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

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Date of Birth \_\_\_\_\_ Email Address \_\_\_\_\_

Phone Number \_\_\_\_\_ Alternate/Message Phone Number \_\_\_\_\_

**B. Family Information**

List the people in your household; include:

- ⇒ Yourself and Spouse and:
- ⇒ Your children, (even if they don't live with you and/or if you pay child support for them and they live with you), **if** you will provide more than half of their support from July 1, 2016 through June 30, 2017 and:
- ⇒ Other people if they now live with you and you provide more than half of their support **and** will continue to provide more than half of their support from July 1, 2016 through June 30, 2017.

Write the names of all household members in the spaces below. Write in the name of the college for any household member, who will be attending college, at least half-time, from July 1, 2016 through June 30, 2017 and will be enrolled in a degree, diploma or certificate program.

**If you need more space, attach a separate page.**

Full Name	Age	Relationship	College
		<b>SELF</b>	<b>UCC</b>

**C. Student and Spouse's (if married) Tax Forms**

Federal Tax Returns, such as the 2015 IRS Form 1040, 1040A, 1040EZ, will no longer be accepted per federal regulations. If applicable, a tax return from Puerto Rico or a foreign income tax return will be accepted. If you and your spouse filed separate 2015 IRS income tax returns, the IRS DRT cannot be used to obtain an IRS Tax Return Transcript.

STUDENT: <i>Check only one box</i>	SPOUSE: (if married) <i>Check all boxes that apply</i>
<input type="checkbox"/> The student <b>has used</b> the IRS Data Retrieval Tool (DRT) in FAFSA to transfer 2015 IRS income tax return information into the student's FAFSA.	<input type="checkbox"/> My spouse <b>has used</b> the IRS Data Retrieval Tool (DRT) in FAFSA to transfer 2015 IRS income tax return information into the student's FAFSA.
<input type="checkbox"/> The student <b>has not yet used</b> the IRS DRT in FAFSA but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed.	<input type="checkbox"/> My spouse <b>has not yet used</b> the IRS DRT in FAFSA but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS income tax return has been filed.
<input type="checkbox"/> The student is unable or chooses not to use the IRS DRT in FAFSA and instead will provide the school a 2015 IRS Tax Return Transcript.	<input type="checkbox"/> My spouse is unable or chooses not to use the IRS DRT in FAFSA and instead will provide the school a 2015 IRS Tax Return Transcript.
<input type="checkbox"/> I will not file or was not required to file 2015 IRS Income Tax Return. Go to Sec. D	<input type="checkbox"/> I will not file or was not required to file 2015 IRS Income Tax Return. Go to Sec. D



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**D. Student and Spouse (if married) Income Information (READ CAREFULLY)  
 (ONLY FILL IN THIS UPPER SECTION IF YOU AND YOUR SPOUSE WERE NOT REQUIRED TO FILE A 2015 IRS INCOME TAX RETURN)**

- You and/or your spouse were not employed and had no income earned from work in 2015 (*Proceed to Section E*)
- You and/or your spouse were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and have attached all W-2's for 2015. (*Fill in the boxes below for you and/or your spouse*)
- You must attach all copies of you and your spouse's (if married) 2015 W-2 forms for any wages earned.
  - You must also complete the below boxes for any other income earned from work. Enter "0" if nothing to report.

STUDENT			SPOUSE		
Source of Income	2015 Amount	W-2 Attached	Source of Income	2015 Amount	W-2 Attached
Safeway (Example)	\$550.00	Yes	Dr. See More (Example)	\$8,000	Yes
	\$			\$	
	\$			\$	



**NOTE: In Section E below:  
 Do not leave any spaces blank; enter "0" if nothing to report.**



**E. Student and Spouse's (if married) Taxed/Untaxed Information**

STUDENT	Student and Spouse (if married) 2015 Additional Financial Information	SPOUSE
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need based employment portions of fellowship assistantships.	\$
\$	Taxable student grant/scholarship aid <b>reported to the IRS in your adjusted gross income.</b> Includes AmeriCorps benefits, as well as grant/scholarship portions of fellowships and assistantships. (Line 7 of 1040 & 1040A – Line 1 of 1040EZ listed as "SCH")	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. <b>Do not include</b> untaxed combat pay.	\$
\$	Earnings from work under a cooperative education program offered by a college.	\$
STUDENT	Student and Spouse (if married) 2015 Untaxed Income	SPOUSE
\$	Payments to tax-deferred pension and savings plans (e.g., 401(k) or 403(b) plans) (paid directly or withheld from earnings), including, but not limited to, amounts reported on the <b>W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S.</b>	\$
\$	Child Support <b>received</b> for all children. <b>Do not include</b> foster care or adoption payments. <b>Print names of children receiving the support:</b> _____	\$
\$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <b>Do not include</b> the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veteran's non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. <b>Do not include</b> Post-9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program or VEAP Benefits.	\$
\$	Other untaxed income such as workers' compensation, disability benefits, Black Lung Benefits, untaxed portions of health savings accounts, Railroad Retirement Benefits. <b>Do not include</b> student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), extended foster care benefits, untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$

**Money Received or Paid on Your Behalf**

List any money received or paid on your behalf and that is not reported elsewhere on this form. Enter the total amount received in 2015.

Purpose: e.g., Cash, Rent, Books, Bills	Source: e.g., Who Paid the Bill or Provided Support?	Amount Received in 2015



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**F. Child Support Paid in 2015**

**No child support was paid by myself or other household members in 2015.** *(Proceed to Section G)*

You reported on your FAFSA that you and/or your spouse (if married) paid child support in 2015. Please fill out the table below with all required data. You may be asked to provide additional documentation should discrepancies be found.

**Note: Do not include support paid for children declared as a household member.**

Name of Person who Paid the Child Support	Name of Person to whom Child Support was Paid	Name of Child for whom Child Support was Paid	Age of Child for whom Child Support was Paid	Amount of Child Support Paid in 2015
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>5</i>	<i>\$ 6,000.00</i>
				\$
				\$
				\$

**G. SNAP Benefits**

**No one in my household received SNAP benefits in 2014 or 2015.**

*(STOP! IF you checked this box, you do NOT need to complete the rest of Section G).*

You have indicated on your 2016-2017 Free Application for Federal Student Aid (FAFSA) that in 2014 or 2015 you (or your spouse) or anyone in your household (from FAFSA question 98) received benefits from the Supplemental Nutrition Assistance Program (SNAP).

Name of Person Receiving SNAP Benefits	Name(s) of Persons Benefits Were Received for and Age(s)	Combined Monthly Amount Received	Year(s) Benefits were Received
<i>Marty Smith (example)</i>	<i>Chris Smith</i> <i>17 yrs.</i>	<i>\$250</i>	<i>2014 &amp; 2015</i>

*By signing below, I certify that the above information is true and correct. I also understand that if I give false or misleading information, I may be fined up to \$20,000, sent to prison, or both.*

Student Signature _____	Date _____
Spouse Signature (optional) _____	Date _____