



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

2022-2023
Verification Worksheet
INDEPENDENT

Your 2022-2023 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.

Student Information

Last Name _____ First Name _____ M.I. _____ Student ID _____
 Mailing Address _____ City _____ State _____ Zip _____
 Email Address _____ Phone Number _____
 Alternate / Message Phone Number _____

Household Size

In the table below, list the people in your household; include:

- ⇒ Yourself (the student),
- ⇒ Your spouse, (if married),
- ⇒ Your children, and/or your spouse’s children,
 - **if** you and/or your spouse will provide more than half of the children’s support from July 1, 2022 through June 30, 2023 even if a child(ren) does not live with you and your spouse.
- ⇒ Other people (additional documentation may be needed),
 - **if** they now live with you, **AND**
 - you or your spouse provide more than half of the other person’s support, **AND**
 - will continue to provide more than half of that person’s support from July 1, 2022 through June 30, 2023.

List **ALL** the people in your household (Yourself, Spouse, Child(ren) etc.) per the instructions above. Next, include the name of the college for any household member who will be enrolled, **at least half-time**, from July 1, 2022 through June 30, 2023 and will be enrolled in a degree, diploma or certificate program at an eligible postsecondary educational institution. ***If you need more space, attach a separate page.***

Full Name	Age	Relationship	College
		SELF	UCC



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Student and Spouse (if married) Tax Filing

Instructions: The instructions below apply to you and/or your spouse, if you are married. Notify the Financial Aid Office if you and your spouse filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020. Complete the sections below if you and your spouse **filed or will file** a 2020 income tax return. The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of the FAFSA. In most cases, no further documentation is needed to verify 2020 income information that was transferred into the FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. If the DRT is not used, you will need to submit a copy of your 2020 IRS Tax Return Transcript to the Financial Aid Office.

STUDENT	Choose ONLY one selection from Section A or Section B.	SPOUSE
	SECTION A	
	You used the IRS Data Retrieval Tool (DRT) in FAFSA on the Web to transfer 2020 IRS income tax return information into your FAFSA.	
	You have not used the IRS Data Retrieval Tool (DRT) in FAFSA and will provide a 2020 IRS Tax Return Transcript or a SIGNED copy of your 2020 Federal Income Tax Return (Form 1040) with applicable schedules (e.g. Schedule 1, 2, 3). *Please note that your file will not be considered complete until the tax return transcript or signed tax return is received.	
	You are unable to or choose not to use the DRT, but you are attaching a 2020 IRS Tax Return Transcript or a SIGNED copy of your 2020 Federal Income Tax Return (Form 1040) with applicable schedules (e.g. Schedule 1, 2, 3). *Please note that your file will not be considered complete until the tax return transcript or signed tax return is received.	
	You did not earn income during 2020; or you earned income, but you were not required to file a 2020 income tax return. Please skip to the <u>Student and Spouse (if married) Non-Tax Filers</u> section below.	
	SECTION B (This section below may not apply to all students/spouse)	
	You have filed a 2020 Amended Federal Income Tax Return (Form 1040X). <u>You must provide to the Financial Aid Office:</u> <ul style="list-style-type: none"> • A SIGNED copy of the 2020 Form 1040X filed; AND • A SIGNED copy of your original 2020 Federal Income Tax Return (Form 1040) with applicable schedules, or 2020 IRS Tax Return Transcript. 	
	You have filed a 2020 Application for Extension granted by the IRS. <u>You must provide to the Financial Aid Office:</u> <ul style="list-style-type: none"> • A copy of the Form 4868. • A copy of the extension beyond the 6 month extension. • Verification of Non-Filing Letter from IRS. • W2's for each source of employment in tax year 2020. • If self-employed, a signed statement certifying the amount of the individual's (AGI) and the U.S. income tax paid for tax year 2020. 	
	You are a victim of IRS Tax-Related Identity Theft. <u>You must provide to the Financial Aid Office:</u> <ul style="list-style-type: none"> • A Tax Return Database View (TRDBV) Transcript obtained from the IRS. • A statement signed and dated by the tax filer that they were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft. 	
	You Filed Non-IRS Income Tax Return <u>A tax filer who filed an income tax return with a tax authority other than the IRS may provide</u> <ul style="list-style-type: none"> • Signed copy of his or her 2020 income tax return that was filed with the relevant tax authority. • If accuracy of information on the 2020 signed copy of the income tax return is questioned, 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. 	



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Student and Spouse (if married) Non-Tax Filers Only

STUDENT		SPOUSE
	<p>You and/or your spouse were not employed, and neither had income earned from work in 2020.</p> <ul style="list-style-type: none"> Provide documentation from the IRS which is called the "Verification of Non-filing Letter". You can obtain the non-filing letter by requesting it from the Irs.gov website. Put a "0" for the dollar amount if you earned no income from work in 2020 below. 	
	<p>You and/or your spouse were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and have attached all W-2's or equivalent for 2020.</p> <p><u>Fill in the boxes below for you and/or your spouse</u></p> <ul style="list-style-type: none"> Provide documentation from the IRS which is called the "Verification of Non-filing Letter". You can obtain the non-filing letter by requesting it from the Irs.gov website. 	

COMPLETE THE TABLE BELOW IF YOU AND/OR YOUR SPOUSE (IF MARRIED) DID NOT FILE TAXES IN 2020

STUDENT			SPOUSE		
Source of Income	2020 W2 Attached?	2020 Amount	Source of Income	2020 W2 Attached?	2020 Amount
(e.g.) Walmart	Yes	\$ 500.00	(e.g.) Walmart	Yes	\$ 500.00
		\$			\$
		\$			\$
		\$			\$

How to Order a Tax Return Transcript if the Data Retrieval Tool (DRT) IS Not Used or Ways to order a Non-Filing Letter

- A. **Get Tax Transcript ONLINE** - Go to [Irs.gov](https://www.irs.gov), click **"Get Transcript Online"**. Make sure to request the **"IRS Tax Return Transcript"** for the correct filing year and **NOT** the **"IRS Tax Account Transcript"**.
- C. Paper Request Form – [IRS Form 4506T](https://www.irs.gov/efile/irs-form-4506t) Transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

- B. **Get Tax Transcript or Non-filing Letter by MAIL** - Go to [Irs.gov](https://www.irs.gov), click **"Get Transcript by Mail"**. Make sure to request the **"IRS Tax Return Transcript"** for the correct filing year and **NOT** the **"IRS Tax Account Transcript"**.
- D. Automated Telephone Request – 1-800-908-9946 Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

Certification and Signature

By signing below, I certify that the above information is true and correct. The student and one parent whose information was reported on the FAFSA must sign and date. 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 _____ (Digital or typed signatures will not be accepted)	Date _____
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Ways to submit your completed documents:

- In person at the Financial Aid Office
- Use the online [Financial Aid Digital Forms Drop Box](#), fill out the web-page and upload your documents
- Use the On campus drop box locations (Admin. Building or Campus Center Building)
- Send in by Fax (541) 440-4612

Please do NOT send by email