



2023-2024 Verification Worksheet INDEPENDENT

Student Biographical Information

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

Your 2023-2024 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.

Aid Year

2223

Student ID *

800277044

Student First Name *

Frank

MI

D

Student Last Name *

Smith

Mailing Address Line 1 *

241 Sunset St

Mailing Address Line 2

City *

Sutherlin

State *

OR

Zip Code *

97479

Email Address *

Frank.Smith@umpqua.edu

Area Code *

360

Phone Number *

3034752

In the table below, list the people in your parents' household. Include:

- ⇒ Yourself (the student)
- ⇒ Your parent(s) (including step-parent) even if you don't live with your parent(s)
- ⇒ Your parent(s) other children, (per description below even if the child does not live with the parent)
 - if your parent(s) will provide more than half of the children's support from July 1, 2023 through June 30, 2024 or
 - if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if a child does not live with the parents.
- ⇒ Other people (additional documentation may be needed)

- If they now live with your parent(s), **AND**
- Your parent(s) 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, 2023 through June 30, 2024. If your parent shares a residence with a domestic partner, do not include the domestic partner or their dependents unless your parent personally provides more than 50% of their support.

List **ALL** the people below in your household (Yourself, Mom, Dad, Brother, Sister, etc.) per the instructions above. Next, include the name of college for any household member, **EXCLUDING THE NAME OF THE COLLEGE YOUR PARENT(S) ATTEND**, who will be enrolled, **at least half-time**, from July 1, 2023 through June 30, 2024 and will be enrolled in a degree, diploma, or certificate program at an eligible postsecondary educational institutions.

Household Size

Start with student. List your Relationship as Self and your College as UCC

Are You Married? *

☐ Yes ☒ No

Household Members

Full Name *	Age *	Relationship *	College
frank	56	self	UCC

Student Tax Information

Student Tax Filing Details

Instructions: The instructions below apply to the student and each parent included in the household. Notify the Financial Aid Office if your parent(s) filed separate IRS income tax returns for 2021 or they have had a change in marital status after December 31, 2021. Complete the sections below if you and/or your parent(s) filed or will file a 2021 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 2021 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 2021 IRS Tax Return Transcript, and any W2(s) to the Financial Aid Office.**

Did You File a 2021 Income Tax Return? *

☒ Filed/Will File ☐ Will Not File

Did You Use the IRS DRT? *

☒ Yes ☐ No

Reason You Did Not Use the IRS DRT *

☐ Have Not Used But Will Use ☐ Unable To Or Choose Not To Use

Upload a 2021 IRS Tax Return Transcript or a SIGNED copy of your 2021 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.**

Please Upload Your 2021 IRS Tax Return/Transcript *

Unusual Tax Filing Circumstances

Have you filed a 2021 Amended Federal Income Tax Return (Form 1040X)? *

☐ Yes ☒ No

You must provide to the Financial Aid Office: • A SIGNED copy of the 2021 Form (1040X) filed; AND • A SIGNED copy of your original 2021 Federal Income Tax Return (Form 1040) with applicable schedules 1, 2, and 3 that were filed with the IRS or 2021 IRS Tax Return Transcript

Please upload your Amended 2021 IRS Tax Document/Transcripts *

Please Upload Your Original 2021 IRS Tax Return Transcript/Document *

Have you have filed a 2021 Application for Extension granted by the IRS? *

☐ Yes ☒ No

You must provide to the Financial Aid Office:

- 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.

Please Upload 4868 Form (one only) *

Please Upload Extension Form (one only).*

Please Upload your Non-Filing Letter (one only).*

Are You Self Employed? *

☐ Yes ☐ No

Please Upload Your Self Employed Signed Statement (one only).*

Please Upload ALL Your W2 Forms For 2021 *

Please Upload ALL Your W2 Forms For 2021 (if any).

Are You a Victim of IRS Tax-Related Identity Theft? *

☐ Yes ☒ No

Please Upload Your TRDBV Transcript *

Please Upload your Signed Statement *

Did You File a Non-IRS Income Tax Return? *

☐ Yes ☒ No

A tax filer who filed an income tax return with a tax authority other than the IRS may provide:

- Signed copy of his or her 2021 income tax return that was filed with the relevant tax authority.
- If accuracy of information on the 2021 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.

Please Upload Your Non IRS Tax Return *

Please Upload Tax Account Information

You must provide to the Financial Aid Office:

- 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.

Student Non-Tax Filers Only

• Provide documentation below 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](https://www.irs.gov) website. If you had no income put "None" for the Source, a "0" for the Amount and "No" to the W2 question, since you earned no income from work in 2021.

Student Verification Upload *

You were not employed, and did not have income earned from work in 2021 *

☐ Had Income ☐ Did Not Have Income

You were employed in 2021 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 2021.

Source(s) of Income

Source*	Amount*	W2 Uploaded?*	W2 Upload

Signature

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.

Signature*

frank

Signature Date*

01/21/2023

Spouse Tax Information

Spouse Tax Filing Details

Instructions: The instructions below apply to the student and each parent included in the household. Notify the Financial Aid Office if your parent(s) filed separate IRS income tax returns for 2021 or they have had a change in marital status after December 31, 2021. Complete the sections below if you and/or your parent(s) filed or will file a 2021 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 2021 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 2021 IRS Tax Return Transcript, and any W2(s) to the Financial Aid Office.**

Did You File a 2021 Income Tax Return?*

☐ Filed/Will File ☐ Will Not File

Did You Use the IRS DRT?*

☐ Yes ☐ No

Reason You Did Not Use the IRS DRT*

☐ Have Not Used But Will Use ☐ Unable To Or Choose Not To Use

Upload a 2021 IRS Tax Return Transcript or a SIGNED copy of your 2021 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.**

Please Upload Your 2021 IRS Tax Return/Transcript*

Unusual Tax Filing Circumstances

Have you filed a 2021 Amended Federal Income Tax Return (Form 1040X)? *

☐ Yes ☐ No

You must provide to the Financial Aid Office: • A SIGNED copy of the 2021 Form (1040X) filed; AND • A SIGNED copy of your original 2021 Federal Income Tax Return (Form 1040) with applicable schedules 1, 2, and 3 that were filed with the IRS or 2021 IRS Tax Return Transcript

Please upload your Amended 2021 IRS Tax Document/Transcripts *

Please Upload Your Original 2021 IRS Tax Return Transcript/Document *

Have you have filed a 2021 Application for Extension granted by the IRS? *

☐ Yes ☐ No

You must provide to the Financial Aid Office:

- 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.

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Please Upload your Non-Filing Letter (one only).*

Are You Self Employed? *

☐ Yes ☐ No

Please Upload Your Self Employed Signed Statement (one only).*

Please Upload ALL Your W2 Forms For 2021 *

Please Upload ALL Your W2 Forms For 2021 (if any).

Are You a Victim of IRS Tax-Related Identity Theft? *

☐ Yes ☐ No

You must provide to the Financial Aid Office:

- 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.

Please Upload Your TRDBV Transcript*

Please Upload your Signed Statement*

Did You File a Non-IRS Income Tax Return?*

☐ Yes ☐ No

A tax filer who filed an income tax return with a tax authority other than the IRS may provide:

- Signed copy of his or her 2021 income tax return that was filed with the relevant tax authority.
- If accuracy of information on the 2021 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.

Please Upload Your Non IRS Tax Return*

Please Upload Tax Account Information

Parent Non-Tax Filers Only

• Provide documentation below 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](https://www.irs.gov) website. If you had no income put "None" for the Source, a "0" for the Amount and "No" to the W2 question, since you earned no income from work in 2021.

Parent Verification Upload*

You were not employed, and did not have income earned from work in 2021*

☐ Had Income ☐ Did Not Have Income

You were employed in 2021 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 2021.

Source(s) of Income

Source*	Amount*	W2 Uploaded?*	W2 Upload

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Signature

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.

Signature *

Signature Date *

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