THE UNIVERSITY OF TEXAS
PERMIAN BASIN

Office of Financial Aid &Scholarships

2023-2024 Verification Worksheet

Form V5

Your FAFSA application was selected for a review process called verification. The law requires us to ask you for information prior to awarding federal aid. In this process, UTPB will be comparing information provided on this form, and possibly other requested documents, with the information you provided on your Free Application for Federal Student Aid (FAFSA). If there are any differences, your FAFSA information may be corrected by this office. Please complete all required sections of this form, failure to complete any of the required sections make cause delays in the processing of financial aid. **Documents received after priority deadline do not guarantee that aid will be available before classes begin and it is recommended that you sign up for a payment plan to hold your classes until your financial aid is processed.**

Fall Priority Deadline: July 15, 2023
Spring Priority Deadline: October 15, 2023

A.   Student Information

Last Name	First Name	M.I.	Social Security Number

Home Phone (include area code)	Cell Phone (include area code)	UTPB student ID

B.   Household size: select ONE dependency status below & list household members as indicated

1. Select ONE dependency status below that corresponds to your answers on the FAFSA

☐ Dependent student – answered "No" to all Dependency Status questions on the FAFSA

List everyone in your parents' household for whom they will provide more than half of their monetary support from July 1, 2023 through June 30, 2024, including:

- o   Yourself;
- o   Your parents (including a stepparent);
- o   Your parent's (and stepparent's) other children, even if they don't live with your parents; and
- o   Other people, if they now live with your parents, and your parents provide more than half of their support and will continue to
- o   provide that support

☐ Independent student – answered "Yes" to one or more Dependency Status questions on the FAFSA

List everyone in your household for whom you will provide more than half of their monetary support from July 1, 2023 through June 30, 2024, including:

- o   Yourself;
- o   Your spouse, if married;
- o   Your children, even if they do not live with you; and
- o   Other people, if they now live with you, and you will continue to provide their support

2. List all household members specified in the applicable list above.

Include the college name for any household member who will be enrolled at least half time at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024. Do not include dual credit. Dependent students do not include parent's college information. Attach additional page if necessary.

Full Name	Age	Relationship	College/University name	Enrolled at least half-time (Y/N)
		Self	UTPB	Y

IRS Tax Return Options

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

If the student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the 2021 IRS Tax Return Transcript(s) must be provided for each. Students can request a transcript by calling 1-800-908-9946. Transcripts will arrive by mail within 5-10 business days. Students can also obtain a transcript at www.irs.gov, under the tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript and NOT the "IRS Tax Account Transcript." Or under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript and NOT the "IRS Tax Account Transcript."

C. Tax filers only: Only complete this section if you/your parents filed a 2019 IRS tax return

Important Note: If you filed, or will file an amended 2021 IRS tax return, UTPB Financial Aid will also require that you submit **a 2021 Tax Return Transcript and an Amended U.S. Individual Income Tax Return(1040X).**

Independent/Dependent students

☐ I, the student (and /or my spouse), have **used the *IRS Data Retrieval** Tool* and successfully transferred my 2021 tax information.

☐ I, the student, (and /or my spouse), am <u>unable or choose not</u> to use the *IRS Retrieval Tool*, and **I will submit a 2021 IRS Tax Return Transcript or signed copy of the 2019 income tax return and applicable schedules.**

Dependent students only

☐ I, the parent, have **used the *IRS Data Retrieval** Tool* and successfully transferred my 2021 tax information.

☐ I, the parent, am <u>unable or choose not</u> to use the *IRS Retrieval Tool*, and **I will submit a 2021 IRS Tax Return Transcript or signed copy of the 2021 income tax return and applicable schedules.**

Non-Tax filers only Complete this section if you/your parents will not file or are not required to file a 2021 IRS tax return

Independent/Dependent students

☐ I, the student (and /or my spouse) was NOT employed and had no income earned from work in 2021. **Both the student (and/ or your spouse) will need to request a "Verification of Non-filing Letter" from the IRS.**

☐ I, the student (and/or my spouse) was employed in 2021 and was not required to file. **Both the student (and/or your spouse) will submit copies of all of 2021 IRS W-2 forms or a 2021 wage and tax transcript and request a "Verification of Non-Filing Letter" from the IRS.**

Dependent students only

☐ I, the parent, was employed in 2021 and was not required to file. **The parent will submit copies of all 2021 IRS W2 forms or a wage and tax transcript and request a "Verification of Non-Filing Letter" from the IRS.**

☐ I, the parent, was NOT employed and had no income earned from work in 2021. **The parent will need to request a "Verification of Non-Filing Letter" from the IRS.**

Employer Name	2021 Amount Earned
(example) ABC's Auto Body Shop	*$4,500*

If you are a non-tax filer you MUST complete the LOW INCOME VERIFICATION FORM. This form details the breakdown of your 2021 expenses and amounts of monies received to cover them. This form is not included with this worksheet, to print this form you must go to https://www.utpb.edu/admissions-aid/financial-aid/financial-aid-forms. Failure to include this form may cause delays in the processing of your financial aid.

Request for Verification of Non-Filing Letter

Paper Request
1. Download the IRS Form 4506Tat http://www.irs.gov/pub/irs-pdf/f4506t.pdf.
2. Print form off and complete lines 1-4. On line 7, check the box to indicate you would like to receive a Verification of Non-Filing, proof that you did not file a return for the year.
3. On line 9 indicate the ending date on the year or period. For 23-24 verification the date should be 12/31/2021.
4. Mail or fax the form to the correct location based on where you live. Use 2nd Page of 45067T to determine this address or fax number.
5. The Verification Letter of Non-Filing will be mailed to you within 10 business days.

D. Verification of High School completion/ Identity & Statement of Educational Purpose

Verification of High School Completion

Check the Appropriate box below, choose only boxes that apply, and provide documentation if necessary:

☐ **I am a High School Graduate and:**
- ☐ An official copy of my final high school transcript is on file with my application for admission.
- ☐ I am providing a copy of my official final high school transcript.
- ☐ I am providing my original High School Diploma.

☐ **I received my GED and:**
- ☐ An official copy of my GED certificate is on file with my application for admission.
- ☐ I am providing a copy of my official GED certificate.

☐ **Home School Students:**
- ☐ An official copy of my home schooled transcript or the equivalent is on file with my application for admission.
- ☐ I am providing a copy of my official home schooled transcript or the equivalent.
- ☐ An official copy of the secondary school completion credential for home schooling that is acceptable under TX law is on file with my application for admission.
- ☐ I am providing an official copy of the secondary school completion credential for home schooling that is acceptable under TX law.

☐ **I have successfully completed at least a two-year college program (earned an Associate's degree or Bachelor's Degree) and:**
- ☐ An official copy of my college transcript, with graduation date, is on file with my application for admission.
- ☐ I am providing an official copy of my college transcript with graduation date.

Verification of Identity & Statement of Educational Purpose

The student must appear in person at *University of Texas Permian Basin (or in front of a notary, see next page)* to verify his or her identity by presenting an in color-unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. In addition, the student must sign, *in the presence of the institutional official (or in front of a notary, see next page)*, the Statement of Educational Purpose provided below.

I certify that I, _____, am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes, and to pay the cost of attendance at *University of Texas Permian Basin*.

Student Signature: _____ Date: _____

Office use only

☐ Verified documentation for H.S. completion is in image or is attached   ☐ Date stamp all documents

In Person	**Used Notary – Received via Mail**
☐ Verified Government Issued Photo ID is legitimate, is the likeness of the person presenting it, and made a copy of photo id ☐ Witnessed student signing form	☐ Received Notary's Certificate of Acknowledgement with WET signatures ☐ Copy of Student's government issued Photo ID

Staff Signature: _____ Date: _____

E. Certification and Signature

I certify that all of the information reported on this worksheet is completed and correct. Both student and parent signatures are required for dependent students.

_____   _____
Student signature   Date

_____   _____
Parent signature   Date

WARNING: If you purposely give false or misleading information, you may be fined, sentenced to jail, or both.

Notary's Certificate of Acknowledgement
For Verification of Identity and Statement of Educational Purpose

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State of _____

City/County of _____

On _____, before me, _____
            Date   Notary's Name

Personally appeared_____and proved to me on basis of satisfactory evidence of
                                Printed name of Signer

identification. _____, to be the above named person who signed the

foregoing instrument.   Type of government-issued Photo ID provided

WITNESS my hand and official seal

      (SEAL)

_____   _____
            Notary Signature   Commission expiration date