

2022-2023 Dependent Student Verification Form (V5)



Name:	UCO ID:
Date of Birth:	Phone Number:

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 and your parents reported on your FAFSA. To verify that you provided correct information the UCO Financial Aid Office will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the UCO Financial Aid Office. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed.

Complete all pages of this verification form and to be considered for maximum eligibility, documents required for verification should be submitted to the Financial Aid Office as soon as possible, but no later than three weeks prior to the end of the term.

Household Size Information Student's Income Information

List the people in your parent(s)' household, include:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents.
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2022, through June 30, 2023, or if the other children would be required to provide parental information if they were completing a FAFSA for 2022–2023. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s), and your parent(s) provide more than half of their financial support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.
- **Do not include foster children.**

• Instructions for college column in table below:

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2022, and June 30, 2023. If more space is needed, attach a separate page with the student's name and UCO ID number at the top.

Full Name	Age	Relationship	College
		Self	UCO

For Official Use Only

Student Financial Information

Please complete either section 1 or section 2 of this document (not both).

Section 1: TAX RETURN FILERS —**Important Note:** If the student filed, or will file, an amended 2020 IRS tax return, the student must contact the UCO Financial Aid office before completing this section.

Instructions: Complete this section if the student, filed or will file a 2020 income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov). In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- The student has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2020 IRS income return information into the student's FAFSA. Either on the initial FAFSA or when making a correction to the FAFSA. The student's school will use the IRS information that was transferred in the verification process.
- The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to retrieve and transfer 2020 IRS income tax return information into the student's FAFSA once the student has filed a 2020 IRS tax return. See instructions about for information on how to use the IRS Data Retrieval Tool. The Financial Aid Office cannot complete the verification process until the IRS information has been transferred into the FAFSA.
- The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and the student will submit to the Financial Aid Office, a copy of the **2020 IRS tax return transcript(s)**. To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-9008-9946. Make sure to request the "IRS tax return transcript" and not the "IRS Tax Account Transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2020 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.
- Check here if the student's IRS tax return transcript is attached to this worksheet.
- Check here if the student's IRS tax transcript will be submitted to the Financial Aid Office later. Verification cannot be completed until the IRS tax return transcript has been submitted to the UCO Financial Aid Office.

OR Section 2: TAX RETURN NONFILERS —Complete this section if the student, will not file and is not required to file a 2020 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2020.
- The student was employed in 2020 and has listed below the names of all the student's employers, the amount earned from each employer in 2020, and an IRS W-2 form is attached, and I certify that I did not file a 2020 tax return. Attach copies of all 2020 IRS W-2 forms issued to the student by employers. List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and UCO ID number at the top.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2020
(Example) ABC's Auto Body Shop	Yes	\$4500
Total Amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2020 IRS income tax return was not filed with the IRS or other relevant tax authority.

- _____ Check here if confirmation of nonfiling is provided.
- _____ Check here if confirmation will be provided later.

Parent Financial Information

Please complete either section 1 or section 2 of this document (not both).

Parent's Income Information to Be Verified—Note: If two parents were reported on page 1 of this worksheet, the instructions and certifications below refer and apply to both parents.

Section 1: TAX RETURN FILERS—**Important Note:** If the student's parent(s), filed, or will file, an amended 2020 IRS tax return, the parent must contact the UCO Financial Aid office before completing this section.

Instructions: Complete this section if the parent, filed or will file a 2020 income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2020 income information that was transferred into the parent's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- The parents have used the IRS DRT in FAFSA on the Web to transfer 2020 IRS income tax return information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The Financial Aid Office will use the IRS information transferred into the student's FAFSA to complete the verification process.
- The parents have not yet used the IRS DRT, but will use the tool to transfer 2020 IRS income tax information into the student's FAFSA once the parent's IRS tax return has been filed. See instructions above for information on how to use the IRS Data Retrieval Tool. The Financial Aid Office cannot complete verification until the parent has transferred IRS information into the student's FAFSA.
- The parents are unable or chooses not to use the IRS DRT, and the parent will submit to the student's school a copy of the **2020 IRS tax return transcript(s)**. To obtain an IRS tax return transcript go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2020 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2020 tax returns were filed, 2020 IRS tax return transcripts must be submitted for each parent.

Check here if IRS tax return transcript is attached to this worksheet.

Check here if IRS tax return transcript will be submitted to the UCO Financial Aid Office later. Verification cannot be completed until the IRS tax return transcript has been submitted to the Financial Aid Office.

If the parents filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s)** must be provided for each.

_____ Check here if a **2020 IRS Tax Return Transcript(s)** is provided.

_____ Check here if a **2020 IRS Tax Return Transcript(s)** will be provided later.

OR Section 2: TAX RETURN NONFILERS—Complete this section if the student's parent(s), will not file and is not required to file a 2020 income tax return with the IRS.

Check the box that applies:

- The parent(s) were not employed and had no income earned from work in 2020.
- One or both parents were employed in 2020 and has listed below the names of all the parent(s) employers, the amount earned from each employer in 2020, and whether an IRS W-2 form or an equivalent document is provided, and I certify that I did not file a 2020 tax return. Attach copies of all 2020 IRS W-2 forms issued to the parent(s) by employer(s). List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and UCO ID number at the top.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2020
(Example) ABC's Auto Body Shop	Yes	\$4500

	Total Amount of Income Earned From Work	\$

High School Completion Status

You must submit documentation of high school completion or an equivalent along with this worksheet.

Check the box of the document you will attach to this worksheet:

- High school diploma or high school transcript including graduation date.
- Official documentation from high school counselor stating your graduation date and reason why high school diploma/transcript is unavailable.
- General Education Development (GED) Certificate.
- State certificate stating you have passed a State-authorized examination recognized as an equivalent of a high school diploma.
- Academic transcript of a successfully completed two-year program acceptable for full-credit towards a bachelor's degree.
- If you are a homeschooled student, a transcript or equivalent, signed by parent or guardian, listing secondary school courses you have completed and documentation that you have successfully completed secondary school education.
- If you are a homeschooled student, a secondary completion credential provided under state law.
- If you do not have documentation meeting any of the above requirements, seeking in associates degree or its equivalent, and excelled academically high school, you may provide documentation of the high school stating that you excelled academically in high school and documentation from your current/future post-secondary institution that you have met the formalized, written policies of admitting such students.

Documentation of Identity/Statement of Educational Purpose

In order to complete the Verification process, you will need to appear in person at your postsecondary institution and present your government issued ID (such as a driver's license, military ID, passport, etc.) and this verification worksheet to an institutionally authorized financial aid administrator. Your financial aid administrator will need to validate the statement below at the time of submission by maintaining a copy of your photo ID and by providing a signature and date. **If you cannot appear in person to submit this worksheet, you will need to provide a copy of your government issued ID and this worksheet notarized by a public notary.**

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose and that
(Print Student's Name)

the federal student financial assistance I may receive will only be used for educational purposes and to pay the costs of attending _____ for
2022-2023.

(Name of Postsecondary Educational Institution)

Student's Signature and Date

Financial Aid Administrator Signature and Date

Notary's Certificate of Knowledge

State of _____ City/County of _____ on _____
before me, _____ personally appeared, _____
(Notary's Name) (Printed name of signer)

And provided to me on basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)
To be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal _____
(Notary Signature) (Date commission expires)

(Seal)

*****Additional documentation can be requested once reviewed by your financial aid administrator due to conflicting information. Please keep this in mind when submitting verification paperwork, and awaiting its processing. *****

Certification/Signature:

The student who completed the FAFSA must sign this form. If you purposely give false or misleading information on this worksheet, you may be fined up to \$20,000, be sent to prison, or both. By signing this form, I/we certify that all the information reported to qualify for federal student aid is complete and correct.

Student Signature **Date**

Parent Signature **Date**

**UCO Office of Student Financial Services
100 N. University Dr.
Box 162
Edmond, OK 73034
Phone: 405-974-2727**

Sensitive information, such as tax documents, and other personal identifiable information should be encrypted for protection when sent via email.

2022-2023 Additional Verification Documentation
(Please maintain a copy of pages 5-6 for your records)

Verification of 2020 Income Information for Individuals with Unusual Circumstances
Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2020 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2020;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2020;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2021;
- A copy of IRS Form W–2 for each source of employment income received for tax year 2020 and,
- If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2020.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2020 must provide:

- A **2020 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A signed copy of the 2020 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

2022-2023 Additional Verification Text Documentation

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, 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.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.