



UHCL - Office of Financial Aid
2023-2024
V5 - VERIFICATION WORKSHEET

Your application was selected for review in a process called “verification.” In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form. If there are differences between your application and the documents you submitted, corrections will be made. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible. Please monitor your UHCL email address for any correspondence from the Office of Student Financial Aid.**

Instructions:

1. Complete this form (black or blue ink ONLY) with the required signatures.
2. Fax, bring, upload or mail this completed form to the University of Houston-Clear Lake, Office of Student Financial Aid.
3. Do not make any corrections to the FAFSA once you have submitted this form.

A: STUDENT INFORMATION:

| | | | |
|------------------|-------------------|-------------|-------------------------------|
| | | | |
| <i>Last Name</i> | <i>First Name</i> | <i>M.I.</i> | <i>UHCL Student ID Number</i> |

B: FAMILY INFORMATION:

An **Independent student** will be able to state at least one of the following to be true. Proof may be requested.

- You were born before January 1, 2000.
- You are admitted to a masters or doctoral degree granting program.
- You were married, as of the day you filed the Free Application for Federal Student Aid.
- You have children for whom you will provide more than half of their support from July 1, 2023 through June 30, 2024.
- You have dependents (other than your children or spouse) who live with you and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.
- You are or were, at any time since you turned age 13, a ward/dependent of the court or in foster care.
- You are or were an emancipated minor as determined by a court in your state of legal residence.
- You are or were in legal guardianship as determined by a court in your state of legal residence.
- You are a veteran of or currently serving on active duty (for purposes other than training) in the U.S. Armed Forces.
- You were on or after July 1, 2022, determined by a school or shelter official to be an unaccompanied youth who is homeless or self-supporting and at risk of being homeless.
- Both of your parents were deceased at any time since you turned 13.

Check a box based on the definition of an independent student as defined above and complete the grid below.

DEPENDENT STUDENT:

List the people in your parent(s)’ household. Include:

- Yourself
- Your custodial parent(s) (include step-parent)
- Your custodial parent(s)’ dependent children, even if the child does not live with your parents
- Other people only if they now live with your parents, and your parents provided more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

INDEPENDENT STUDENT:

List the people in your household. Include:

- Yourself
- Your spouse, if married
- Your dependent children, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, even if the child does not live with you.
- Other people if they now live with you, and you provided more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half-time |
|-------------------|-----------|---------------|----------------------|-------------------------------------|
| <i>Samuel Doe</i> | <i>28</i> | <i>Spouse</i> | <i>UH-Clear Lake</i> | <i>Yes</i> |
| | | <i>Self</i> | | |
| | | | | |
| | | | | |
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C: STUDENT FEDERAL TAX RETURN and INCOME INFORMATION:

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) on the FAFSA. If you have not already utilized this tool, please visit FAFSA.ed.gov, log in to the 2023-2024 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 DRT to transfer 2021 IRS income tax information into the FAFSA. After uploading tax data, please be sure to sign and resubmit the FAFSA.

Alternatively, you may request a 2021 Federal Tax Return Transcript directly from the IRS –not a photocopy of your tax return. To obtain an IRS tax return transcript, go to www.irs.gov and click on the “Get a Tax Transcript” link, or call 1-800-908-9946. 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 2021 IRS tax return was filed).

IMPORTANT: Please read each statement and complete the section depending on which is most accurate. These questions pertain to the student only.

| Student <u>2021</u> Tax Information | |
|-------------------------------------|---|
| | I have successfully used the FAFSA’s IRS Data Retrieval Tool to load and submit my income information onto the FAFSA. |
| | I have not yet, but will use the FAFSA’s DRT to transfer my income information onto the FAFSA (I understand that the verification process cannot be completed until this information is received) |
| | I am unable or chose not to use the FAFSA’s DRT to transfer my income information. I have either attached a copy of my Tax Return Transcript here, or I will request a copy of a Tax Return Transcript to be mailed to me and will then forward it to my Financial Aid Office (I understand that the verification process cannot be completed until this information is received) |
| | I filed an Amended IRS Income Tax Return, I was Granted a Filing Extension by the IRS, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. I will contact the Financial Aid Office for detailed instructions on how to complete verification |
| | I did not and am not required to file a 2021 Federal Tax Return. Complete and submit a Student Non-Filer Form available at: https://www.uhcl.edu/costs-aid/forms-resources/ |

D: IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE

The student **must appear in person** at the University of Houston–Clear Lake to verify his or her identity by presenting an unexpired **valid government-issued photo identification (ID)**, such as, but not limited to, a driver’s license, other state-issued ID, or passport. The institution will maintain a copy of the student’s photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student’s ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided on the next page:

Please contact the Financial Aid Office by phone at 281-283-2480 to schedule an appointment to complete this section, or visit our office during business hours.

Identity and Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student’s Name)

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 attending _____ for 2023-2024.
(Name of Postsecondary Educational Institution)

(Student’s Signature)

(Date)

(Student’s ID Number)



If you are an Independent student, **STOP** here and proceed to section **G**.
If you are a Dependent student, proceed to section **F**

F: PARENT(S) FEDERAL TAX RETURN and INCOME INFORMATION:

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) on the FAFSA. If your parent(s) have not already utilized the tool, go to FAFSA.gov, log in to the 2023-2024 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 DRT to transfer 2021 IRS income tax information into the FAFSA. After uploading tax data, please be sure to sign and resubmit the FAFSA.

Alternatively, you may request a 2021 Federal Tax Return Transcript directly from the IRS –not a photocopy of your tax return. To obtain an IRS tax return transcript, go to www.irs.gov and click on the “Get a Tax Transcript” link, or call 1-800-908-9946. Make sure to request the “IRS tax return transcript” and not the “IRS tax account transcript.” Your parents will need their Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2021 IRS tax return was filed).

IMPORTANT: Please read each statement and complete the section depending on which is most accurate. These questions pertain to the parent only.

| Parent <u>2021</u> Tax Information (for Dependent Students Only) | |
|--|--|
| <input type="checkbox"/> | I have successfully used the FAFSA’s IRS Data Retrieval Tool to load and submit my income information onto the FAFSA. |
| <input type="checkbox"/> | I have not yet, but will use the FAFSA’s DRT to transfer my income information onto the FAFSA (I understand the verification process cannot be completed until this information is received) |
| <input type="checkbox"/> | I am unable or chose not to use the FAFSA’s DRT to transfer my income information. I have either attached a copy of my Tax Return Transcript here, or I will request a copy of a Tax Return Transcript to be mailed to me and will then forward it to my Financial Aid Office (I understand the verification process cannot be completed until this information is received) |
| <input type="checkbox"/> | I filed an Amended IRS Income Tax Return, I was Granted a Filing Extension by the IRS, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. I will contact the Financial Aid Office for detailed instructions on how to complete verification |
| <input type="checkbox"/> | I did not and am not required to file a 2021 Federal Tax Return. Complete and submit a Parent Non-Filer Form available at: https://www.uhcl.edu/costs-aid/forms-resources/ |

G: SIGN THIS WORKSHEET:

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. I understand that the Office of Financial Aid reserves the right to request additional information as needed. Furthermore, I understand that all completed information must be received two (2) weeks prior to the end of the semester for the semester I wish to receive aid in order to receive aid. If dependent, at least one parent must sign. **WARNING:** If you purposefully give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student’s Name

Student Signature

Parent/Step-parent Signature (required for DEPENDENT students ONLY)