

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 2019-2020 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 2017 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 2017 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 2017 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>2017</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 2017 Federal Tax Return. Complete and submit a Student Non-Filer Form available at: https://www.uhcl.edu/costs-aid/forms-resources/ |



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

State law requires that you be informed of the following: (1) with few exceptions, you are entitled on request to be informed about the information the University collects about you by use of this form; (2) under sections 552.021 and 552.023 of the Government Code, you are entitled to receive and review the information; and (3) under section 559.004 of the Government Code, you are entitled to have the University correct information about you that is incorrect.

D: 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 2019-2020 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 2017 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 2017 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 2017 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>2017</u> Tax Information (for Dependent Students Only) | |
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| | 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 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 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 2017 Federal Tax Return. Complete and submit a Parent Non-Filer Form available at: https://www.uhcl.edu/costs-aid/forms-resources/ |

E: 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)

State law requires that you be informed of the following: (1) with few exceptions, you are entitled on request to be informed about the information the University collects about you by use of this form; (2) under sections 552.021 and 552.023 of the Government Code, you are entitled to receive and review the information; and (3) under section 559.004 of the Government Code, you are entitled to have the University correct information about you that is incorrect.