

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 2020-2021 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 2018 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 2018 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 2018 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>2018</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 2018 Federal Tax Return. Complete and submit a Student Non-Filer Form available at: https://www.uhcl.edu/costs-aid/forms-resources/

D: STUDENT HIGH SCHOOL INFORMATION:

Provide one of the following documents that indicate the student’s high school completion status when the student begins college in 2020–2021:

- ✓ A copy of the student’s high school diploma.
- ✓ For students who completed secondary education in a foreign country, a copy of the “secondary school leaving certificate” or other similar document.
- ✓ A copy of the student’s final official high school transcript that shows the date when the diploma was awarded.
- ✓ A state certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- ✓ An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.
- ✓ For a student who was homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student’s parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.
- ✓ DD Form 214 Certificate of Release or Discharge From Active Duty.

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.

E: 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 below:

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 2020-2021.
(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**

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.

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 2020-2021 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 2018 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 2018 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 2018 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>2018</u> Tax Information (for Dependent Students Only)	
	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 2018 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)

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