Umpqua Community College
Financial Aid Office
PO Box 967
Roseburg, Oregon 97470
541.440.4602 | 541.440.4612 (FAX)
FinancialAid@umpqua.edu

2019-2020 Verification Worksheet INDEPENDENT

Your 2019-2020 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 reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and/or your spouse whose information was reported on the FAFSA must complete and sign this verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

A. Student Information

Last Name___________________________ First Name__________________________ M.I._____ Student ID______________________

Mailing Address____City____________________ State______ Zip_________________

Date of Birth_________________________ Email Address____

Phone Number___________________________________ Alternate/Message Phone Number__________________________________

B. Family Information

List the people in your household; include:

⇨ Yourself and Spouse and

⇨ Your children and/or your spouse's children, **if** you and/or your spouse will provide more than half of their support from July 1, 2019 through June 30, 2020 even if the child(ren) does not live with you and your spouse.

⇨ Other people if they now live with you and your spouse and you and/or your spouse provide more than half of their support **and** will continue to provide more than half of their support from July 1, 2019 through June 30, 2020.

List **ALL** the people in your household (*Yourself, Spouse, Child(ren) etc.*) per the instructions above. Next, include the name of the college for any household member who will be enrolled, at least half-time, from July 1, 2019 through June 30, 2020 and will be enrolled in a degree, diploma or certificate program at an eligible postsecondary educational institution. ***If you need more space, attach a separate page*.**

Full Name	Age	Relationship	College
		SELF	***UCC***

DID SOMEONE PAY A BILL IN YOUR NAME OR GIVE YOU MONEY TO PAY A BILL?

C. Money Received or Paid on Your Behalf – ***List any money received or paid on your behalf and that is not reported elsewhere on this form. Enter total for 2017. Enter 0 if nothing to report. DO NOT LEAVE BLANK!***

***Purpose**: e.g., Cash, Rent, Books, Bills*	***Source:** e.g., Who Paid the Bill or Provided Support?*	***Amount Received in 2017***
		$
		$
		$

Umpqua Community College
Financial Aid Office
PO Box 967
Roseburg, Oregon 97470
541.440.4602 | 541.440.4612 (FAX)
FinancialAid@umpqua.edu

2019-2020 Verification Worksheet INDEPENDENT

How To Order A Tax Return Transcript

1. Get Transcript by **MAIL** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
2. Get Transcript **ONLINE** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
3. Automated Telephone Request – 1-800-908-9946
4. Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

D. Student and Spouse's (if married) Tax Forms

Instructions: The instructions below apply to you and/or your spouse, if you are married. Notify the Financial Aid Office if you or your spouse filed separate IRS income tax returns for 2017 or had a change in marital status after December 31, 2017. Complete the sections below if you and/or your spouse **filed or will file** a 2016 income tax return. The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of the FAFSA. In most cases, no further documentation is needed to verify 2017 income information that was transferred into the FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. If the DRT is not used, you will need to submit a copy of your 2017 IRS Tax Return Transcript to the Financial Aid Office.

STUDENT: ***Check only one box***	**SPOUSE:** ***Check all boxes that apply***
☐ The student **has used** the IRS Data Retrieval Tool (DRT) in FAFSA to transfer 2017 IRS income tax return information into the student's FAFSA.	☐ My spouse **has used** the IRS Data Retrieval Tool (DRT) in FAFSA to transfer 2017 IRS income tax return information into the student's FAFSA.
☐ The student **has not yet used** the IRS Data Retrieval Tool (DRT) in FAFSA to transfer 2017 IRS income tax return information into the student's FAFSA.	☐ My spouse **has not yet used** the IRS Data Retrieval Tool (DRT) in FAFSA to transfer 2017 IRS income tax return information into the student's FAFSA.
☐ The student is **unable or chooses not to use** the IRS Data Retrieval Tool (DRT) in FAFSA and instead will provide the school a 2017 IRS Tax Return Transcript.	☐ My spouse **is unable or chooses not to use** the IRS Data Retrieval Tool (DRT) in FAFSA and instead will provide the school a 2017 IRS Tax Return Transcript.
☐ The student **was not required to file** 2017 IRS Income Tax Return. ***Student must fill out Form 4506-T at www.irs.gov and request Verification of Nonfiling. Once received, turn verification of Nonfiling in to the Financial Aid Office. See "How To Order A Tax Return Transcript" at top of this page.***	☐ My spouse **was not required to file** 2017 IRS Income Tax Return. ***Spouse must fill out Form 4506-T at www.irs.gov and request Verification of Nonfiling. Once received, turn verification of Nonfiling in to the Financial Aid Office. See "How To Order A Tax Return Transcript" at top of this page.***

DO NOT COMPLETE THE SECTION BELOW (SEC. E) IF YOU FILED TAXES IN 2017.

E. Check the box that applies: *(This section is for Nontax Filers Only)*

☐ **You and/or your spouse were not employed and neither had income earned from work in 2017.**

- *Provide documentation from the IRS which is called the "Verification of Nontax Filing Transcript". You can obtain this document by filling out Form 4506-T.* ***OR***

☐ **You and/or your spouse were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and have attached all W-2's or equivalent for 2017.** (*Fill in the boxes below for you and/or your spouse)*

- *Provide documentation from the IRS which is called the "Verification of Nontax Filing Transcript". You can obtain this document by filling out Form 4506-T.*

STUDENT

Source of Income	2017 W2 Attached?	2017 Amount
Safeway (Example)	*Yes*	*$550.00*
		$
		$
		$

SPOUSE

Source of Income	2017 W2 Attached?	2017 Amount
Safeway (Example)	*Yes*	*$550.00*
		$
		$
		$

Umpqua Community College
Financial Aid Office
PO Box 967
Roseburg, Oregon 97470
541.440.4602 | 541.440.4612 (FAX)
FinancialAid@umpqua.edu

2019-2020 Verification Worksheet INDEPENDENT

Do not leave any spaces blank; enter "0" if nothing to report.

F. Student and Spouse's Taxed/Untaxed Information

STUDENT	Student and Spouse's 2017 Additional Financial Information	SPOUSE
$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need based employment portions of fellowship assistantships.	$
$	Taxable student grant/scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits, as well as grant/scholarship portions of fellowships and assistantships. (Line 37 of 1040, Line 21 of 1040A or Line 4 of 1040EZ listed as "SCH")	$
$	**Combat pay or special combat pay**. Only enter the amount that was taxable and included in your adjusted gross income. **Do not include** untaxed combat pay.	$
$	Earnings from work under a cooperative education program offered by a college.	$

STUDENT	Student and Spouse's 2017 Untaxed Income	SPOUSE
$	Payments to tax-deferred pension and savings plans (e.g., 401(k) or 403(b) plans) (paid directly or withheld from earnings), including, but not limited to, amounts reported on the **W-2 form** in **boxes 12a through 12d, codes D, E, F, G, H, and S.** **Do not include** amounts reported in code DD.	$
$	Child Support **received** for all children. **Do not include** foster care or adoption payments.	$
$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Do not include** the value of on-base military housing or the value of a basic military allowance for housing.	$
$	Veteran's non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	$
$	Other untaxed income such as workers' compensation, disability benefits, and untaxed portions of health savings accounts, **Do not include** extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	$

G. Unusual Circumstances – *Please mark all that apply and supply appropriate documentation. If they don't apply, leave blank.*

Student &/or Spouse Granted a Filing Extension by the IRS

☐ STUDENT ☐ SPOUSE

You must provide to the Financial Aid Office:

- ☐ A copy of the Form 4868
- ☐ A copy of the extension beyond the 6 month extension
- ☐ Verification of Non-Filing Letter from IRS
- ☐ W2's for each source of employment in tax year 2016

Student &/or Spouse Filed Non-IRS Income Tax Return

If you or your spouse filed a Non-IRS Income Tax Return, contact the Financial Aid Office for further instruction.

Student &/or Spouse Filed an Amended IRS Income Tax Return

☐ STUDENT ☐ SPOUSE

You must provide to the Financial Aid Office:

- ☐ 2017 IRS Tax Return Transcript
- ☐ Signed copy of the 2017 IRS Form 1040X

Student &/or Spouse Victims of Tax-Related Identity Theft

☐ STUDENT ☐ SPOUSE

You must provide to the Financial Aid Office:

- ☐ Tax Return DataBase View (TRDBV) from the IRS
- ☐ Signed & dated statement by tax filer indicating they were a victim of IRS tax-related identity theft and that the IRS is aware of the incident.

By signing below, I certify that the above information is true and correct. I also understand that if I give false or misleading information, I may be fined up to $20,000, sent to prison, or both.

Student Signature______________________________	Date________________
Spouse Signature (Optional)______________________________	Date________________