

Dependent Verification Worksheet

Office of Student Financial Services
 P. O. Box 20036 • Houston, TX 77225
 (713) 500-3860 phone • (713) 500-3863 fax
<https://www.uth.edu/sfs/>

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Your 2024–2025 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Federal regulations require this institution to verify the information you and your parents reported on your FAFSA with the information reported on this worksheet. If there are differences, we may be required to correct your FAFSA information. Failure to submit this information will prohibit your federal aid from disbursing to your student account.

You and at least one parent who was included on the FAFSA must complete and sign this worksheet and submit the form to the Office of Student Financial Services. If your legal parents (biological or adoptive) are **not married to each other** and **live together**, you must provide information about both of them, regardless of their gender. If your parents are **married**, regardless of gender [consistent with the Supreme Court decision on the Defense of Marriage Act], and **live together** you must provide information about both of them. If the contributing parent included on FAFSA is remarried, answer the questions about that parent and the stepparent.

If requested, you may be asked to submit additional information. For questions regarding verification, contact the Office of Student Financial Services as soon as possible to avoid processing delays.

Submit forms using ONE of the following methods:

1. **Online:** Log on to **myUTH**, click on the **To Do List Item**, select **Submit** button and follow instructions.
2. **In Person:** UCT Building, 7000 Fannin, Suite 2220, Houston, TX 77030

COMPLETE ALL SECTIONS

 Student Last Name First Name M.I.

 Student Date of Birth

 Student Street Address (include apt. no.)

 Student Email Address

 City State Zip Code

(____) _____
 Student Phone Number

A. FAMILY SIZE

List below the people included in the parent's family size. Refer to "NOTE" below.

Include:

- **The student**
- **The student's parents** (including a stepparent) even if the student is not living with with the parents. Include a parent who is on active duty in the U.S. Armed Forces apart from the family. Exclude a parent who is deceased or is not living the household due to separation or divorce.
- **The student's siblings** if the following are true:
 - They live with the student's parents (or live apart because of college enrollment)
 - They receive more than half their support from the student's parents; AND
 - They will continue to receive more than half their support from the student's parent during the award year
- **Other persons** if the following are true:
 - They live with the student's parents
 - They receive more than half their support from the student's parents; AND
 - They will continue to receive more than half their support from the student's parent during the award year

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		Student		
		Parent/Step-Parent	<i>This section intentionally left blank</i>	
		Parent/Step-Parent	<i>This section intentionally left blank</i>	

If more space is needed, provide a separate page with the student's name and ID number at the top.

NOTE: The criteria for "dependent children" or "other persons" align with the requirement of those whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2024-2025 FAFSA. As a result, the parent should not include any unborn children or any individuals for whom they do not or could not claim as a dependent for tax filing purposes in the family size.

Our office reserves the right to request additional documentation if we have reason to believe that the information regarding family size is inaccurate

Student Name _____
Last First M.I.

Student ID:

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B. STUDENT FILING STATUS

Has the student filed or intends to file a 2022 Federal Income Tax Return with the IRS?

Check the box that applies:

NO. Proceed to Sections C and E through H

YES. Skip to Sections D through H

C. STUDENT TAX NON-FILER

The instructions and certifications below apply to the student. Complete this section if the student will not file AND is not required to file a 2022 Federal Income Tax Return with the IRS.

Check the box that applies:

The student was not employed and had no income earned from work in 2022.

The student was employed in 2022, but was not required to file a Federal Income Tax Return with the IRS. List below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. **Provide copies of all 2022 IRS W-2 forms or equivalent documents issued to the student by his/her employers.**

Student Employer's Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2022
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

If more space is needed, provide a separate page with the student's name and ID number at the top.

D. STUDENT TAX FILER

Important Note: The instructions below apply to the student.

Instructions: Complete this section if the student filed or will file a 2022 Federal Income Tax Return with the IRS.

The best way to verify income is by using the [FUTURE ACT Direct Data Exchange](#) (FA-DDX) tool to transfer federal tax information (FTI) from the Internal Revenue Service (IRS) to the FAFSA. You must provide consent to transfer tax data directly from the IRS to the FAFSA even if that information may not be available to be transferred to the FAFSA.

Check the box that applies:

The student is *eligible and used* the FA-DDX to transfer 2022 federal tax information from the IRS to the 2024-2025 FAFSA.

The student is *not eligible* to use the FA-DDX to transfer 2022 federal tax information from the IRS to the 2024-2025 FAFSA. The student has provided the school with one of the following:

2022 Federal Income Tax Return Transcript(s)

Signed copy of the 2022 Federal Income Tax Return and applicable schedules

E. PARENT TAX FILING STATUS

Have the parents filed or intend to file a 2022 Federal Income Tax Return with the IRS?

Check the box that applies:

NO. Proceed to Sections F and H

YES. Skip to Sections G through H

F. PARENT TAX NON-FILER

The instructions and certifications below apply to each parent/stepparent included on the FAFSA. Complete this section if the parents will not file AND are not required to file a 2022 Federal Income Tax Return with the IRS.

Check the box that applies:

Neither parent was employed and neither had income earned from work in 2022.

One or both parents were employed in 2022, but were not required to file a Federal Income Tax Return with the IRS. List below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form or equivalent document. **Provide copies of all 2022 IRS W-2 forms issued or equivalent documents issued to the parents by their employers.**

Student Name _____
 Last First M.I.

Student ID:

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Parent Employer's Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2022
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

If more space is needed, provide a separate page with the student's name and ID number at the top.

Per federal guidelines, an IRS Verification of Non-filing Letter (VNF) or other confirmation of non-filing is only required when verifying income earned from work for a non-tax filer who would file a tax return with a tax authority other than the Internal Revenue Service (IRS). Check the box that applies.

IRS Verification of Non-filing Letter or other confirmation of non-filing has been provided.

I attest that I attempted to acquire the Verification of Non-filing Letter from the IRS or other relevant tax authority and was unable to obtain the required documentation for the following reason:

Reason MUST be provided if VNF or other tax authority document is not provided

G. PARENT TAX FILER

Important Note: The instructions below apply to each parent included on the FAFSA. Notify the Financial Aid Office if the parents filed separate IRS income tax returns for 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the parents filed or will file a 2022 Federal Income Tax Return(s) with the IRS.

The best way to verify income is by using the [FUTURE ACT Direct Data Exchange](#) (FA-DDX) tool to transfer federal tax information (FTI) from the Internal Revenue Service (IRS) to the FAFSA. You must provide consent to transfer tax data directly from the IRS to the FAFSA even if that information may not be available to be transferred to the FAFSA. If parents are married or not married and living together and filed taxes separately, both parents will need to log in and provide consent to transfer FTI.

Check the box that applies:

The parents *are eligible and used* the FA-DDX to transfer **2022** federal tax information from the IRS to the student's 2024-2025 FAFSA

The parents are *not eligible* to use the FA-DDX to transfer **2022** federal tax information from the IRS to the student's 2024-2025 FAFSA.

The parents have provided the school one of the following:

2022 IRS Tax Return Transcript(s)

Signed copy of the 2022 Federal Income Tax Return and applicable schedules

H. CERTIFICATION AND SIGNATURES

Each person signing this verification worksheet certifies that all of the information reported is complete and correct and acknowledges the receipt of the Verification of 2022 Income for Tax Filers disclosure which contains FA-DDX recommendations and information for individuals with unusual tax filing circumstances. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

 Student Signature REQUIRED (*no electronic signatures accepted*)

 Date

 Parent Signature REQUIRED (*no electronic signatures accepted*)

 Date

Verification of 2022 Income for Tax Filers

FUTURE ACT Direct Data Exchange (FA-DDX)

The best way to verify income is by using the FUTURE ACT Direct Data Exchange (FA-DDX) tool to transfer federal tax information (FTI) from the Internal Revenue Service (IRS) to the FAFSA. You and any contributors must provide consent to transfer tax data directly from the IRS to the FAFSA even if that information may not be available to be transferred to the FAFSA. If parents are married or not married and living together and filed taxes separately, both parents will need to log in and provide consent to transfer FTI.

To obtain a 2022 IRS Tax Return Transcript

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "**Return Transcript**" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "**Return Transcript**" and **NOT** the "Account Transcript." To use Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2022 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- A signed statement listing the sources of any 2022 income and the amount of income from each source
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2022; 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 2022.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the FA-DDX, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2022 tax account information.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 **IRS Form 1040X, "Amended U.S. Individual Income Tax Return,"** that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR recored with all tax information from the original tax return;
- A **2022 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; or
- A signed copy of the 2022 IRS Form 1040 and applicable schedules that were filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; **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.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS 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.