

## Independent 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 2025–2026 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/stepparent 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 must complete, sign and submit this worksheet to the Office of Student Financial Services. If the student is married or remarried, the student's spouse may be required to submit tax and/or income documentation.

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 online via myUTH or in person at 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 student's family size.** The criteria for "dependent children" or "other persons" aligns with the requirement of those whom the student and spouse, if married, could claim as a dependent on a U.S. tax return if they were to file a U.S. tax return at the time of completing the 2025-2026 FAFSA. Our office reserves the right to request additional documentation if we have reason to believe that the information regarding family size is inaccurate.

**Include:**

- **The student**
- **The student's spouse**, if the student is married
- **The student's (or spouse's) dependent children** if all of the following are true:
  - They live with the student (or live apart because of college enrollment)
  - They receive more than half their support from the student; AND
  - They will continue to receive more than half their support from the student during the award year
- **Other persons** if the following are true:
  - They live with the student
  - They receive more than half their support from the student; AND
  - They will continue to receive more than half their support from the student during the award year

| Full Name | Age | Relationship   | College |
|-----------|-----|----------------|---------|
|           |     | <i>Student</i> |         |
|           |     |                |         |
|           |     |                |         |
|           |     |                |         |
|           |     |                |         |

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

#### B. STUDENT TAX FILER

**Complete this section if the student (and spouse, if married) filed or will file a 2023 Federal Income Tax Return with the IRS.**

**Check the box that applies:**

- ☐ I and my spouse (if married) consented to transfer 2023 federal tax information from the IRS to the 2025-2026 FAFSA.
- ☐ I and my spouse (if married) consented, but are not eligible to transfer 2023 federal tax information from the IRS to the 2025-2026 FAFSA and have provided the school with one of the following:
- ☐ **2023 Federal IRS Income Tax Return Transcript(s)**
- ☐ **Signed copy of the 2023 Federal Income Tax Return with applicable schedules and W-2 forms**

Contact the Financial Aid Office if the student and spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

Student Name \_\_\_\_\_  
Last First M.I.

Student ID: 

|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|

### C. STUDENT NON-FILER

Complete this section if the student (and spouse, if married) *will not file* and *are not required* to file a 2023 Federal Income Tax Return with the IRS.

*By completing this document, I and my spouse (if married) certify that we have not filed and are not required to file a 2023 income tax return, and have listed below all income earned from work, other income, and resources for the 2023 tax year.*

List below the names of all employers and other sources of income, the amount earned from each employer or source in 2023, and whether an IRS W-2 form or an equivalent document was provided by the employer. Provide copies of all 2023 IRS W-2 forms or equivalent documents issued to the student (and spouse, if married) by his/her employers.

| Employer and/or Other Source of Income/Resources<br><small>(Example: ABC's Auto Body Shop; Rental property)</small> | W-2 or Equivalent<br>Provided? | Annual Amount<br>Earned in 2023 |
|---|--------------------------------|---------------------------------|
|   |                                |                                 |
|   |                                |                                 |
|   |                                |                                 |
|   |                                |                                 |
| Total amount of income  |                                |                                 |

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

Nontax filers who would file a tax return or equivalent document with a tax authority other than the Internal Revenue Service (IRS) are required to submit a verification of nonfiling status from a relevant tax authority other than the IRS for the tax year being verified.

Check, if applicable:

☐ I and/or my spouse (if married) were employed, but filed a tax return or equivalent document with a tax authority other than the IRS.

Check the box that applies.

☐ Verification of Non-filing from a tax authority other than the IRS has been provided.

☐ I and/or my spouse (if married) attest, that an attempt to acquire a Verification of Non-filing from a tax authority other than the IRS was made but we were unable to obtain the required documentation for the following reason:

\_\_\_\_\_

### D. 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 2023 Income for Tax Filers disclosure containing 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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature OPTIONAL

\_\_\_\_\_  
Date

**\*\*Digital signatures not accepted\*\***

## Verification of 2023 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 and approve sharing and importing income tax information from the IRS to the FAFSA form even if the attempt to obtain or use such data is ineffective. 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 2023 IRS Tax Return Transcript

- Get Transcript by Mail – Go to [www.irs.gov](http://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](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the **"Return Transcript"** and **NOT** the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the [ID.me IRS Help Site](https://www.id.me/irs/help).
- 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 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
- A signed statement listing the sources of any 2023 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 2023; **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 2023.

**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 2023 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 2023 must provide a signed copy of the 2023 **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:

- Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2023 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 2023 IRS Form 1040 and applicable schedules that were filed with the IRS.

### Individuals Who Were Victims of IRS Tax-Related Identity Theft

- A copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; **and**
- An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or 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.