2016 – 2017 Verification Instructions for Tax Extension Filers

If you have been selected for Verification for the 2016 – 2017 award year, you are required to provide the UCLA Financial Aid and Scholarships office with a copy of your and/or your parents’ 2015 federal tax returns along with a Verification Form. If you are unable to provide a federal tax return due to filing an Application for Automatic Extension of Time to File U.S. Individual Income Tax Return (Form 4868), the Financial Aid and Scholarships office may use discretion to provide federal aid based on a projection of your or your parents’ 2015 income. However, you must provide Financial Aid and Scholarships with documentation that your tax filing extension was granted and documentation that can be used to project your 2015 income.

If an extension was filed but the returns will be completed within a sufficient time frame to allow award (see below) we recommend that you hold off on submitting your verification forms until all required documentation is available.

If you are applying for financial aid assistance for Summer 2016 and you or your parents’ tax returns will not be filed before June 1, 2016 or if you are applying for 2016 – 2017 academic year and the returns will not be filed before August 1, 2016 please submit the following documentation:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return” (automatically grants the taxpayer a six-month extension beyond the April 18 deadline) or a copy of the IRS approval of an extension beyond the automatic six-month extension.
- Completed 2016-2017 Verification Form
- Available tax returns. For example if you are a dependent student and your parents filed for an extension, please provide your (the student’s) tax return with the verification form.
- Verification of 2015 income and interest earnings (w-2’s, 1099 forms, etc.) If you or your parents were self-employed, please provide a signed statement with 2015 income information.

NOTE: Cal Grant, Middle Class Scholarship, Institutional aid, Perkins or Work-Study eligibility will not be awarded until a 2015 federal tax return is received and can be reviewed by Financial Aid and Scholarships.

The federal deadline to submit verification documents is no later than 60 days after your last day of attendance or August 30th 2017, whichever is sooner. However, we encourage students to submit verification documents as soon as possible. Delays in completion and submittal of verification documents may result in limited funding for 2016 – 2017.

If it is determined that projected tax information was estimated incorrectly, Financial Aid and Scholarships may adjust your award according to your eligibility. If you are awarded aid that we later determine you did not qualify for, you will be required to repay the overpayment.

UCLA Financial Aid and Scholarships

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