



2018 – 2019 Verification Instructions for Tax Extension Filers

If you are unable to provide UCLA Financial Aid and Scholarships with copies of 2016 tax transcripts because you and/or your parents were granted an extension, please read this guide.

If an extension was filed but the returns will be completed by April 13, 2018 (if you are applying for summer aid) or June 15, 2018 (if you are applying for academic year assistance) we recommend that you hold off on submitting your verification forms until all required documentation is available.

If you have been granted an extension to file that is longer than six months, please provide Financial Aid and Scholarships with:

- An unexpired copy of the IRS approval of an extension beyond the automatic six-month extension and a copy of the IRS Form 4868.
- Completed 2018-2019 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 2016 income and interest earnings (W-2's, 1099 forms, etc.) If you or your parents were self-employed, please provide a signed statement with 2016 income information.

NOTE: Cal Grant, Middle Class Scholarship, Institutional aid, Perkins or Work-Study eligibility will not be awarded until a 2016 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 2018, 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 2018 – 2019.

If it is determined that 2016 year tax information was estimated incorrectly, Financial Aid and Scholarships may adjust your aid 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.



IMPORTANT

UCLA

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