UCLA Financial Aid and Scholarships

I

2020-2021 INDEPENDENT VERIFICATION FORM

_____   _____
Last Name   First Name   UID#

Your file has been selected for a review process called "Verification" which is based upon verifying the data provided on your Free Application for Federal Student Aid (FAFSA)/DREAM Application. We cannot finalize your eligibility for financial aid until you submit all required verification documents. Delays in completion and/or document submission may result in limited funding and/or late disbursement of aid for 2020-2021 (including summer 2020). **Incomplete Verification Forms will not be processed regardless of circumstance. To ensure timely processing, we strongly encourage you to submit all documents by the priority deadline listed on this form.**

STUDENT INFORMATION (Do NOT Leave Blank)

❑ **Check this box if you plan to enroll for Summer 2020** (Separate Summer Aid Application is Required)

Student Income Information

Did you or your spouse (if applicable) file a 2018 income tax return with the IRS or a foreign country?

❑   **Yes** (Proceed to _Option 1_)   ❑   **No** (Proceed to _Option 2_)

Option 1**: If you filed a Tax Return with the IRS or a foreign country, select ONE option below:**

❑ Check here if you successfully transferred your 2018 Federal Tax information onto your FAFSA via the IRS Data Retrieval Tool. Log onto MyUCLA and access your Documents Requested tab to determine if you are still required to submit your 2018 Tax Transcript. _Note: DRT is not available to CA Dream applicants._

❑ Check here if you did not transfer your 2018 Federal Tax information onto your FAFSA via the IRS Data Retrieval Tool and are submitting a complete copy of your and your spouse's (if applicable) 2018 Tax Return Transcript(s) (Foreign Income Tax Filers must provide a translated English copy of their foreign tax return converted to U.S. dollars). See instructions on how to obtain an IRS _Tax Return Transcript_ on the Instruction Page.

Option 2**: If you did not file taxes and were NOT required to file taxes, select ONE option below:**

❑ Check here if you and your spouse (if applicable) certify that you were not employed and had no income earned from work during 2018. You must attach an IRS _Verification of Non-Filing_ letter that indicates you (and/or your spouse) did not file taxes in 2018.

❑ Check here if you and your spouse (if applicable) were employed and were not required to file taxes during 2018. List every employer even if the employer did not issue an IRS W-2 form and the amount earned from each employer. Attach copies of all 2018 W-2(s) received **AND** an IRS _Verification of Non-Filing_ letter that indicates you did not file taxes in 2018.

Employer's Name/Source of Income	2018 Amount Earned	W-2 Attached
		❑ Yes
		❑ Yes
		❑ Yes
		❑ Yes

CERTIFICATION STATEMENT

I certify that all the information reported on this form is complete and accurate. I understand that I may be required to provide additional documentation. Purposely providing false or misleading information on this worksheet, may result in an investigation by the Inspector General for Student Aid Fraud. I understand that certain awards (ex: University Grants) are subject to availability of funds that may not be available if the form is submitted late in the academic year.

_____   _____
Student Signature *(No electronic signatures)*   **Date**   **Spouse Signature** *(No electronic signatures)*   **Date**

HOW TO SUBMIT

Online	Fax:	
Log on to MyUCLA> click Finances and Jobs tab> under Financial Aid and Scholarships click> View All Documents. Attach form as necessary.	Fax: 310-267-4143 Attn: UCLA Financial Aid and Scholarships	

INDEPENDENT VERIFICATION INSTRUCTION PAGE

TAX RETURN FILERS—Federal 2018 Tax Return (Form 1040) and applicable schedules are acceptable in lieu of IRS Tax Return Transcript

A 2018 IRS *Tax Return Transcript* may be obtained through the following options:

- **Online Request via PDF**: Proceed to www.IRS.gov. Select *"Get Your Tax Record"* and choose the *"Get Transcript Online"* option. You will be required to log in or create an account. Select *"Higher Education/Student Aid"* as the reason you need a transcript and enter an optional Customer File Number*. Select the year *"2018"* under the *Return Transcript* box. Do NOT choose an Account Transcript.

- **Online Request via Mail:** Proceed to www.IRS.gov. Select *"Get Your Tax Record"* and choose the *"Get Transcript by Mail"* option. Enter your social security number or individual tax ID number, date of birth, street address, and zip or postal code. In the Transcript Type field, select *"Return Transcript"* (do NOT choose the Account Transcript) and in the Tax Year field, select "*2018"*. Enter an optional Customer File Number*.

- **Telephone Request:** Call 1-800-908-9946

- **Paper Request Form:** Download IRS Form 4506T-EZ or IRS Form 4506-T on www.IRS.gov.

NON-TAX FILERS

A 2018 IRS *Verification of Non-Filing* letter may be obtained through the following options:

- **Online Request**: Proceed to www.IRS.gov. Select *"Get Your Tax Record"* and choose the *"Get Transcript Online"* option. You will be required to log in or create an account. Select *"Higher Education/Student Aid"* as the reason you need a transcript and enter an optional Customer File Number*. Select a *Verification of Non-Filing* letter for *2018*.

- **Paper Request:** If you are unable to register online, you can print Form 4506-T from www.IRS.gov to request a *Verification of Non-Filing* letter via mail.

*Using a **Customer File Number** is optional. This number will display on the transcript when it is downloaded or mailed. To assist UCLA in matching the transcript to your student record, we suggest using your UID Number. *Do not use your Social Security Number.*

IMPORTANT THINGS TO KNOW

- Delays in completion and submission of all financial aid documents required will result in limited funding and/or late release of the Financial Aid Notification (FAN) for the 2020-2021 school year (including summer 2020).

- Mask first five digits of all Social Security Numbers on the documents you are submitting. Failure to do so will delay the preparation of your documentation for review and awarding.

- The federal deadline to submit verification documents is no later than 60 days after your last day of attendance or August 30, 2021, whichever is sooner.

- You may check the status of your financial aid by logging onto your MyUCLA portal: http://www.my.ucla.edu.

DO NOT SUBMIT THIS PAGE