

STUDENT INFORMATION (Do NOT Leave Blank)

Things To Remember When Submitting Tax Return Transcripts for Students (For Informational Purposes Only)

- 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 “2021” 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 “2021”. 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

Student Income Information

Did you, the student, file a 2021 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:

- You successfully transferred your 2021 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 2021 Tax Transcript. *Note: DRT is not available to CA Dream applicants.*
- You did not transfer your 2021 Federal Tax information onto your FAFSA via the IRS Data Retrieval Tool and are submitting a complete copy of your 2021 Tax Return Transcript (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 a *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:

- You (the student) certify that you were not employed and had no income earned from work during 2021.
- You were employed and were not required to file taxes during 2021. 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 2021 W-2(s) received.

Employer's Name/Source of Income	2021 Amount Earned	W-2 Attached
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes

PARENT INFORMATION (Do NOT Leave Blank)

Things To Remember When Submitting Tax Return Transcripts for Parents (For Informational Purposes Only)

- If parent marital status is “*Married or Remarried*” and their tax filing status for 2021 was “Married Filing Separately,” you must attach a copy of **BOTH** your parents' 2021 IRS Tax Return Transcripts
- If parent marital status is “*Divorced or Separated*” or “*Widowed*” and my parents' tax filing status for 2021 was “Married Filing Jointly,” you must attach a copy of your parents' 2021 IRS Tax Return Transcript **AND** copies of all their 2021 Form W-2(s)
- If parent marital status is “*Unmarried, Both Legal Parents Living Together,*” you must attach a copy of **BOTH** parents' 2021 IRS Tax Return Transcripts

Parent Income Information

Did your parent(s) file a 2021 income tax return with the IRS or a foreign country?

- Yes** (Proceed to *Option 1*) **No** (Proceed to *Option 2*)

Option 1: If your parent(s) filed a Tax Return with the IRS or a foreign country, select ONE option below:

Your parent(s) successfully transferred their 2021 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 their 2021 Tax Transcript(s). *Note: DRT is not available to CA Dream applicants.*

Your parents did not transfer their 2021 Federal Tax information onto your FAFSA via the IRS Data Retrieval Tool and are submitting a complete copy of their 2021 Tax Return Transcript (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 your parent(s) did not file taxes and were NOT required to file taxes, select ONE option below:

- Your parent(s) were not employed and had no income earned from work during 2021. You must attach an IRS *Verification of Non-Filing* letter that indicates your parent(s) did not file taxes in 2021.
- Your parent(s) were employed and were not required to file taxes during 2021. 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 2021 W-2(s) received **AND** an IRS *Verification of Non-Filing* letter that indicates your parent(s) did not file taxes in the year 2021.

Employer's Name/Source of Income	2021 Amount Earned	W-2 Attached
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes

CERTIFICATION STATEMENT

I certify that all 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 (i.e. University Grant) are subject to availability of funds that may not be available if the form is submitted late.

Student Signature*

Date

Parent Signature*

Date

*Electronic signatures are NOT acceptable.

HOW TO SUBMIT

ONLINE Log on to MyUCLA> click Finances and Jobs tab> under Financial Aid and Scholarships click> View All Documents. Attach form as necessary.	FAX: Fax: 310-267-4143 Attn: UCLA Financial Aid and Scholarships	Priority Submission Deadline Summer: April 7, 2023 Academic Year: June 09, 2023
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DEPENDENT VERIFICATION INSTRUCTION PAGE

TAX RETURN FILERS—Federal 2021 Tax Return (Form 1040) and applicable schedules are acceptable in lieu of IRS Tax Return Transcript

A 2021 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 “2021” 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 “2021”. 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.

PARENT NON-TAX FILERS

A 2021 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 2021.
- ◆ **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.
- ◆ **Identity Theft Victims** - If you are unable to obtain a Tax Return Transcript, you may call the IRS's Identity Protection Specialized Unit (IPSU) toll-free number at 1-800-908-4490. You may request an alternate paper tax return transcript known as the TRDBV (Transcript Database View), which will be accepted by our office for verification purposes. You will also need to submit the signed and dated statement indicating that you were a victim of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

*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 2023-2024 school year (including summer 2023).
- ◆ 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, 2024, whichever is sooner.
- ◆ You may check the status of your financial aid by logging onto your MyUCLA portal: <http://www.my.ucla.edu>.

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