



# VERIFICATION WORKSHEET

## DEPENDENT

Student's Name \_\_\_\_\_

UCFID \_\_\_\_\_

Parent(s) Name \_\_\_\_\_

Date \_\_\_\_\_

- Read carefully and complete this verification packet in **black or blue ink**.
- Please refer to your SAR (Student Aid Report) when answering the questions. Any discrepancy may need an explanation and additional documentation.
- Please answer your questions as of the date you and your parents signed the FAFSA.
- If a question does not apply to you or your parent/s, mark the answer as zero or N/A (not applicable).
- Do not skip any questions. If you leave any section blank, this form may be deemed incomplete and result in the delay of processing aid.

**Below is information & instructions for whom to include in the Household, as well as for the "Name of College field."**

### Who is a parent (for the FAFSA)?:

For the FAFSA, "Parent" refers to your biological and/or adoptive parents (as well as your step-parent if that person is currently married to your "Parent")

The following are **NOT considered to be a "legal parent (for the FAFSA):"**

- Grandparents, foster parents, legal guardians, aunts and uncles are NOT considered parents unless they have legally adopted you.
- Any person who is not married to your parent and who is not a legal or biological parent.

### A. If Parent Marital Status is:

- **Single**
- **Divorced**
- **Separated** – As of the date the FAFSA was completed, the parents were not living together for an indefinite period of time and the marriage is severed.
- **Widowed**

#### Include the following in the Household

- Yourself (the student)
- Your parent – The responsible parent is the parent with whom you lived the most during the 12 months before your financial aid application was signed. If you did not live with either parent, or if you lived with each parent an equal number of days (including zero days), your responsible parent is the parent who provided you the most support in the most recent 12-month period. Support means gifts, loans, housing, food, clothing, car, money, medical and dental care, payment of college costs, etc.
- Your parent's other children **IF**
  - your parent will provide more than 50% of the children's support from July 1, 2023 through June 30, 2024 - **OR**
  - The children attending college would be required to provide parent information when completing the FAFSA
- Other people currently living with your parent for whom **your parent currently provides and will continue to provide at least 50% of their support** from July 1, 2023 to June 30, 2024

#### **DO NOT Include the following:**

- Foster Children
- Any child your parent is paying child support for

### B. If Parent Marital Status is:

- **Married or Remarried, OR**
- **Unmarried** – and Both Parents LIVING TOGETHER

#### Include the following in the Household

- Yourself (the student)
- BOTH of your parents (as listed on the FAFSA)
  - If the parents you are listing remarried, please list your parent and step-parent.
    - You are required to provide your step-parent's information in all sections of this form and provide verification of tax information for both your parent and step-parent.
- Your parents' other children **IF**
  - Your parents will provide more than 50% of the children's support from July 1, 2023 through June 30, 2024 - **OR**
  - The children attending college would be required to provide parent information when completing the FAFSA
- Other people currently living with your parents for whom **your parents currently provide and will continue to provide more than 50% of their support** from July 1, 2023 to June 30, 2024.

#### **DO NOT Include the following:**

- Foster Children
- Any child your parent is paying child support for

### Instructions for completing "ATTENDING COLLEGE"

On your FAFSA application, you were asked to identify the number of people attending college for the 2023 – 2024 aid year. The number in college should include any household member who:

- Will be enrolled at least half-time at an eligible postsecondary education institution at any time between July 1, 2023 and June 30, 2024
- Will be enrolled in a degree, diploma, or certificate program
- **THE NUMBER IN COLLEGE SHOULD NOT INCLUDE YOUR PARENT(S)**

For each person who meets the above criteria, indicate the name of the college. **If the college person is attending UCF – be sure to also list that person's UCF ID.**

**NOTE:** We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Continue to the next page.

Submit complete forms at [finaid.ucf.edu/upload](http://finaid.ucf.edu/upload). Route this form to Verification/ Taxes

Phone: 407.823.2827 • Fax: 407.823.5241 • Web: [finaid.ucf.edu](http://finaid.ucf.edu) | A Division of Student Success and Well-being

## Section I: Family Information

**A.** What was your parents' marital status as of the date you first completed the FAFSA?

Single

Divorced

Separated

Widowed

Married or Remarried

Unmarried & both parents living together

**B.** If your parents were divorced or your parent was widowed, as of the date you first completed the FAFSA, was the parent you are using remarried? \_\_\_ Yes \_\_\_ No

## Section II: Parents' Household Size & Number in College

**A.** You and Your Parent(s)/Step-Parent

Full Name	Date of Birth	Relationship
		Student / Self
		Parent 1 (father, mother, stepparent)
		Parent 2 (father, mother, stepparent)

**B. Your Siblings:** List siblings who will receive more than half of their financial support from your parent(s) between July 1, 2023 and June 30, 2024 or are required to use parent information when completing the FAFSA.

Full Name	Date of Birth mm-dd-yyyy	Relationship	If attending college, at least half-time list: College Name, City, State	UCF ID if sibling is attending UCF	Type of Degree Seeking
John Example	01/25/1999	brother	UCF Orlando, FL	1234567	BA
1.					
2.					
3.					

**C. Other Dependents:** List other dependents who live with your parent(s) AND will receive more than half of their financial support from your parent(s) between July 1, 2022 and June 30, 2023.

Full Name	Date of Birth mm-dd-yyyy	Relationship	If attending college, at least half-time list: College Name, City, State	UCF ID if sibling is attending UCF	Type of Degree Seeking
Jane Example	01/25/1999	niece	n/a	1234567	n/a
1.					
2.					
3.					

## Section III: Family 2021 Untaxed Income

1. 2021 Untaxed portions of IRA distribution and pensions from IRS form 1040 (lines 4a + 5a) minus (lines 4b +5b). Total untaxed amount received in 2021:.....

**STUDENT**      **PARENT**

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**Was the above amount (#1) reinvested in a retirement account?** Yes /No       Yes /No

2. 2021 payments to tax-deferred pension and savings plans (paid directly to or withheld from earnings) including but not limited to amounts reported on your 2021 W-2 in boxes 12a through 12d (Codes D, E, F, G, H, & S). Total amount received in 2021:.....

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**ATTACH COPIES OF ALL 2021 W-2 FORMS FOR ITEMS REPORTED ON #2.**

3. 2021 IRS Deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form1040 Schedule 1 ( total lines 16 + 20).....

\$ \_\_\_\_\_ \$ \_\_\_\_\_

If you listed an amount for #3 be sure to include a copy of the IRS tax return, Schedule 1, when submitting the 2021 tax return/transcript, except if you used the IRS Data Retrieval tool.

## Section IV: 2021 Excluded Income Information

	<u>STUDENT</u>	<u>PARENT</u>
1. 2021 Education credits from IRS Form 1040 Schedule 3 - line 3.	\$ _____	\$ _____

## Section V: Asset Information

Complete every question in this section to report the **net value** of assets as of the day you first completed the FAFSA. The net value is defined as the cash out or sale value minus the debt directly related to the asset. Do not leave any answer blank.

	<u>STUDENT</u>	<u>PARENT</u>
<b>CASH, SAVINGS, AND CHECKING ACCOUNTS:</b> .....	\$ _____	\$ _____
<b>REAL ESTATE:</b> ..... (Ex: land, rental property, second and summer homes. DO NOT INCLUDE THE HOME YOU LIVE IN.)	\$ _____	\$ _____
Was rental property sold?.....	<input type="radio"/> Yes / <input type="radio"/> No	When? _____
Address of Rental property→→→→ _____		
<b>INVESTMENTS:</b> ..... (Ex: Qualified tuition plans such as Florida Prepaid and 529s, CDs, trusts, mutual funds, stocks, bonds, Education IRAs, S corporations, partnerships, etc.)	\$ _____	\$ _____
<b>BUSINESS:</b> ..... (Ex: land, buildings, inventories, equipment, machinery, etc. Note: Do not report small businesses that you or your parent(s) own and control that has 100 or fewer full time or full time equivalent employees.)	\$ _____	\$ _____
<b>FARM INVESTMENT:</b> ..... (Ex: livestock, machinery, land, buildings, equipment, etc.)	\$ _____	\$ _____
<b>Does the family live on a farm?</b> Yes      No		

If the tax return indicates the existence of an asset such as interest, dividends, capital gains, rental real estate, partnerships, and S corporations, and you report a \$0 net value, please provide a written explanation below.

Explanation: \_\_\_\_\_

## Section VI: Verification of 2021 Income

### A. Did you (or were you required to) file a 2021 tax return?

Student:  Yes  No    Parent 1 (father, mother, stepparent):  Yes  No    Parent 2 (father, mother, stepparent):  Yes  No

- If Yes, you must provide a **signed copy of the 2021 tax return, 2021 tax return transcript** or use the **IRS Retrieval Tool** on the FAFSA. To request a copy of the transcript, go to [www.irs.gov](http://www.irs.gov) under "Get your Tax Record" or call 1-800-908-9946.
- If parent(s) answered No, each non-filer parent is required to provide the **IRS Verification of Non-Filing Letter**. To request this letter, go to [www.irs.gov](http://www.irs.gov) and complete the Form 4506-T.
- Dependent students are **NOT** required to provide the IRS Non-Filing Letter

If parent(s) attempted to request the IRS Verification of Non Filing Letter and were unable to obtain it, please indicate below

- Parent 1 - Attempted to obtain the Verification of Non-Filing Letter from the IRS or other tax authorities and was unable to obtain the required documentation.  
 Parent 2 - Attempted to obtain the Verification of Non-Filing Letter from the IRS or other tax authorities and was unable to obtain the required documentation.

### B. Complete the section below if you or your parents did not file and are not required to file a 2021 federal tax return.

**All Non-Tax Filers must provide a signature on Section VII, page 4.**

List all employer(s) and amounts earned in 2021. If self-employed, list "Self-employed" as the employer and report the income earned. If you or your parent(s) did not work at all in 2021, write N/A for name of employer(s).

Non-Tax Filer	Income Earned In 2021?	Name of Employer	2021 Income Earned	W-2s Attached
Student:	<input type="checkbox"/> Yes <input type="checkbox"/> No	1	\$	<input type="checkbox"/>
		2	\$	<input type="checkbox"/>
		3	\$	<input type="checkbox"/>
Parent 1:	<input type="checkbox"/> Yes <input type="checkbox"/> No	1	\$	
		2	\$	
		3	\$	
Parent 2:	<input type="checkbox"/> Yes <input type="checkbox"/> No	1	\$	
		2	\$	
		3	\$	

### C. Only complete this section if your parents were not required to file a 2021 tax return.

Annual Amount(s) Received in 2021	Parents
Food Stamps / SNAP	\$
Foreign Income	\$
Alimony	\$
Housing Assistance	\$
Non-Financial Aid Support from Others (i.e. food, housing, insurance, etc.)	\$
VA Benefits: <input type="radio"/> Educational / <input type="radio"/> Non - Educational	\$
Worker's Compensation	\$
Other Income	\$

## Section VII: Required Signatures

By signing below, you and your parents, certify that all the information in this packet has been read and completed accurately and truthfully.

\_\_\_\_\_  
Your Signature (Student)

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Parent 1 (father, mother, stepparent)

\_\_\_\_\_  
Parent 2 (father, mother, stepparent)