



# 2022-2023 Verification Worksheet

Your financial aid application was selected for a review process called "Verification". The law (34 CFR, Part 668) requires you to provide this information before being awarded federal aid. This may include 2020 Federal Tax Transcripts, W-2 Statements, and/or any other documents needed to complete this process.

Please complete and return this form and any requested documentation to the Office of Financial Aid. Documents may be faxed to 410.837.5493 or scanned and emailed to [financialaid@ubalt.edu](mailto:financialaid@ubalt.edu) or uploaded online by visiting our Financial Aid Forms webpage at <http://www.ubalt.edu/admission/financial-aid/resources/forms.cfm>  
Please review your "To Do List" on your student portal for updates once submitted.

## A. STUDENT INFORMATION

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Student ID Number (begins with 1 or 3)</i>
<i>Email Address</i>	<i>Telephone Number</i>		<i>Date of Birth</i>

## B. FAMILY INFORMATION (NOTE: Students using parental data on the FAFSA are classified as dependent).

<p><b>Dependent Students</b> List the people in your parent's household including:</p> <p>a) Yourself.</p> <p>b) Parent(s) (including step-parent) even if you don't live with them.</p> <p>c) Your parents' other children, even if they do not live with your parent(s), if (1) your parents will provide more than half of their support from July 1, 2022 through June 30, 2023 or (2) the children would be required to give parental information when applying for Federal Student Aid.</p> <p>d) Any other people if they now live with your parents, your parents provide more than half of their support, and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.</p>	<p><b>Independent Students</b> List the people in your household including:</p> <p>a) Yourself and your spouse, if married.</p> <p>b) Your children, if any, if you will provide more than half of their support from July 1, 2022, through June 30, 2023, or if the child would be required to provide your information if they were completing a FAFSA for 2022-2023 include children who meet either of these standards, even if they do not live with you.</p> <p>c) Any other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.</p>
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	Full Name	Age	Relationship	Name of College	Did/Will this person file a 2020 Federal Tax Return?
1			Self	University of Baltimore	Yes ___ No ___
2					Yes ___ No ___
3					Yes ___ No ___
4					Yes ___ No ___
5					Yes ___ No ___
6					Yes ___ No ___

## C. Student's Income and Tax Information - Check only one box below.

- I have utilized the FAFSA IRS Data Retrieval Tool (DRT) AND did not change any of the information that was transferred.
- The student and/or spouse chooses not to use the DRT and will either provide signed 2020 tax returns or a 2020 IRS Tax Return Transcript.
- The student and/or spouse is not required to file a 2020 Federal Tax Return. (Report Income in C2 below)

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1. Verification of untaxed income. **If an item does not apply leave blank or enter 0.** (Include your spouse's information if independent)

Sources of Untaxed Income	2020 Amount	Sources of Untaxed Income	2020 Amount
a. Payments to tax deferred pension <i>(W-2 box 12 a-d codes D,E,F,G,H,S)</i> and/or IRA Deductions/Payments	\$	c. Tax Exempt Interest	\$
b. Untaxed portions of pensions and/or IRA distributions	\$	d. Other – (Please describe)	\$

2. Verification of additional financial information - If you did not file and are not required to file a 2020 Federal income tax return, list below your employer(s) and any additional income received in 2020. (Include your spouse's information if independent)

**You must supply:**

- Copy of all relevant W2s, or a wage and income transcript from IRS, or equivalent document
- And a Verification of Non-filing Letter from the IRS or other relevant tax authority dated on or after October 1, 2021.

Sources	Total 2020 Income
	\$
	\$

**D. Parent(s)' Income and Tax Information** - Check only one box below.

- My parent(s) utilized the DRT AND did not change any of the information that was transferred.
- My parent(s) are unable or choose not to use the DRT and will either provide signed 2020 tax returns or a 2020 IRS Tax Return Transcript. If parents filed separate returns, both transcripts have to be turned in.
- My parent(s) will not file, and are not required to file, a 2020 Federal Tax Return (Report Income in D2 below.)

1. Verification of untaxed income. **If an item does not apply leave blank or enter 0.**

Sources of Untaxed Income	2020 Amount	Sources of Untaxed Income	2020 Amount
a. Payments to tax deferred pension <i>(W-2 box 12 a-d codes D,E,F,G,H,S)</i> and/or IRA Deductions/Payments	\$	c. Tax Exempt Interest	\$
b. Untaxed portions of pensions and/or IRA distributions	\$	d. Other – (Please describe)	\$

2. Verification of additional financial information - *If your parent(s) did not file and are not required to file a 2020 Federal income tax return, list below their employer(s) and any additional income they received in 2020.*

**You must supply:**

- Copy of all relevant W2s, or a Wage and Income Transcript or equivalent document
- And a Verification of Non-filing Letter from the IRS or other relevant tax authority dated on or after October 1, 2021.

Sources	Total 2020 Income
	\$
	\$

## E. Sign this worksheet

*Each person signing this form certifies that all the information reported on it is complete and correct.*

	<b>Date</b>		<b>Date</b>
<b>Student Signature</b>		<b>Parent Signature</b>	

**WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.