

Instructions for Responding to Requests for Documents

Print Your Documents

You must click on each underlined form on Tab 3 of [My Aid Status](#) to print necessary coversheets and worksheets.

Review and Prepare Your Documents

Once you print the required forms, complete them and collect and review all other documents that you must provide. Be sure each document is legible, complete, and signed. If you cannot provide a requested document, please contact our office.

Photocopies

We encourage you to keep photocopies of all documents you submit. If you are required to provide tax transcripts, birth certificates, social security cards or other personal documents, you should provide our office with photocopies. Do not submit your original documents. Once received, your documents become property of the UCSB Office of Financial Aid and Scholarships and are non-returnable. Our office will not be able to make photocopies for you.

Photocopies must be clear (legible) and complete. Photocopy both sides of double-sided documents and all pages of multi-page documents.

Regarding Federal Tax Return Transcripts, if Requested:

- Photocopies of Tax Returns are not sufficient for Financial Aid Verification. Federal guidelines require that students submit Federal Tax Return Transcripts or use the IRS Data Retrieval tool on the [FAFSA](#) if selected for Verification.
- Do not submit IRS Form [4506-T](#) to our office. You must send this document to the IRS in order to receive a copy of your Tax Return Transcript. Alternatively, you may view and print your Tax Return Transcripts from the [IRS website](#) or by phone at 1-800-908-9946.
- Do not send Tax Return Transcripts unless we request them on Tab 3 of [My Aid Status](#).
- Print the bar-coded worksheet from Tab 3 and attach it to the front the tax transcript.
- Please sign your Tax Return Transcript before submitting it to our office. **We also strongly urge you to print your student's name and perm number on this document.**
- If you/your parents have not yet filed, submit a copy of your/their Tax Extension IRS Form 4868. Submit photocopies of the tax transcript as soon as it is filed.

Name and Perm Number

Print your (the student's) name and UCSB perm number at the top of each document. For multi-page documents, add this information to the front side of the first page only.

Assemble Your Documents

Securely attach all requested documents, forms and/or worksheets prior to mailing.

Return Your Documents Packet by the Due Date

Mail or return your documents all at once as one complete "packet" to our office within the calculated due date that appears on Tab 3 of [My Aid Status](#). **Failure to submit your documents by the due date will result in loss of consideration for UCSB Grant eligibility.**

Before You Mail, Make Sure:

1. Your name and Perm number appear on the face of all documents, forms, worksheets, etc.
2. All your documents are signed; and
3. All documents are securely attached.

Send Your Documents To: Office of Financial Aid and Scholarships

University of California, Santa Barbara
Santa Barbara, CA 93106-3180

Failure to submit SIGNED copies of your federal income tax transcripts will delay your financial aid application.