

2023-2024

Independent Verification Worksheet

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have verification questions, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

Independent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's CWID
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

Independent Student's Family Information

List below the people in the **student's household**. **INCLUDE:**

- **Yourself.**
- **Your spouse** if you are married.
- **Your children**, if any, if you will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if they do not live with you.
- 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 through June 30, 2024.
- Include the name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023, and June 30, 2024. If more space is needed, attach a separate page with your name and CWID at the top.

Full Name	Age	Relationship	College	Enrolled at least half-time
		Self	OSUIT	Yes

Verification of 2021 Income Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the student and spouse filed or will file a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web.* In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in FAFSA on the Web but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA once the 2021 IRS income tax return has been filed.
- The student is unable or chooses not to use the IRS DRT in FAFSA on the Web and instead will provide the school a **2021 IRS Tax Return Transcript(s), or a signed copy of the 2021 IRS Federal Tax Return including IRS Schedules 1,2, and 3 sent to the IRS.**

2021 TAX RETURN NON-FILERS

Important Note: Complete this section if you will not file and you are not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- I did not earn income from wages in 2021 and was not required to file a 2021 IRS Federal Tax Return per the IRS. By checking this box, I certify that I attempted to contact the IRS to receive a statement of non-filing (IRS 4506-T) for the tax year 2021.
- I was employed in 2021 and have listed below the names of all my employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Attach copies of **ALL** 2021 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and CWID at the top.* By checking this box, I certify that I attempted to contact the IRS to receive a statement of non-filing (IRS 4506-T) for the tax year 2021.

Circle one: Student / Spouse Name of non-filing individual: _____	IRS W-2 Provided? Y/N	Annual Amount Earned in 2021
Employer's Name:		
Total Amount of Income Earned from Work		

Verification of 2021 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2021.
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2021 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2021, provide both of the following:

- A **2021 IRS Tax Return Transcript**; or
- Signed copy of the 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS, OR complete the IRS Data Retrieval Tool
- A **signed copy** of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

- A victim of IRS identity theft who is not able to obtain a 2021 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2021 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2021 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2021 income tax return(s).
- Convert amounts earned to U.S. currency, providing the equivalent to each parent's income from work, Adjusted Gross Income, Income Taxes Paid.

Certification and Signatures

Each person signing this worksheet certifies that all reported information is complete and correct. The student must sign, spouse signature is optional. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

Student's Signature

Date

Spouse's Signature (optional)

Date

Please return the form to:

OSUIT Financial Aid & Scholarships

1801 E. 4th St., Okmulgee, OK 74447

918.293.4684 | 918.293.4650 (fax)

OSUITFinancialAid@okstate.edu

<https://osuit.edu/financial-aid/index.php>