



# OGLETHORPE

UNIVERSITY

2022-23

## Verification Worksheet Dependent Student

Your 2022-23 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 and your parents 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 and at least one parent 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 questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

### A. Dependent Student's Information

Student's Last Name

Student's First Name

Student's M.I.

Student's ID Number

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

### B. Dependent Student's Family Information

List below the people in your parent(s)' household. Include:

- Yourself(student) and your parent(s) (including a stepparent) even if you (student) does not live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2022, through June 30, 2023, or if the other children would be required to provide parental 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 your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2023.

Include the name of the college for any household member, excluding your parent(s), 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, 2022, and June 30, 2023.

**If more space is needed, attach a separate page with the student's name, Social Security Number or student ID number at the top.**

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

## Student Section

### C. Verification of 2020 Income Information for Student Tax Filers

1. **TAX RETURN FILERS - Important Note:** The instructions below apply to the student not the parent(s). Also, if the student filed, or will file, an amended 2020 IRS tax return, the student must contact the financial aid administrator before completing this section.

**\*\*\*Have you or will you be required to file a U.S. Federal Tax Return? Please circle: Yes or No**

**If no, please skip to Section D. If yes, please continue with Section C and indicate whether you used the IRS data retrieval tool or you will submit a 2020 tax transcript.**

**Instructions:** Complete this section if the student and spouse filed or will file a 2020 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 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 Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2020 IRS income information into the student's FAFSA.
- The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web but will use the tool to transfer 2020 IRS income information into the student's FAFSA.
- The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2020 IRS tax return transcript(s)** - not photocopies of the 2020 tax return.

**Or Request:**

**A 2020 IRS Tax Return Transcript:** may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Check here if a **2020 IRS Tax Return Transcript(s)** is provided.

Check here if a **2020 IRS Tax Return Transcript(s)** will be provided later.

**Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.**

Student's Name: \_\_\_\_\_ Student's ID Number: \_\_\_\_\_

**D. Verification of 2020 Income Information for Student Nontax Filers**

The instructions and certifications below apply to the student not the parent(s). Complete this section if the student, will not file and is not required to file a 2020 income tax return with the IRS.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2020.
- The student was employed in 2020 and did not file a 2020 tax return has listed below the names of all the student's employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is attached. Provide copies of all 2020 IRS W-2 forms issued to the student by employers. List every employer even if employer did not issue an IRS W-2 form. **\*\*\*NOTE: Also, if student checked this box, the student would need to provide a signed statement indicating that he/she did not file a 2020 tax return.**

**If more space is needed, attach a separate page with the student's name, Social Security Number or student ID number at the top.**

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2020
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
<b>Total Amount of Income Earned From Work</b>		\$

## Parent(s) Section

### E. Verification of 2020 Income Information for Parent Tax Filers

1. **TAX RETURN FILERS – Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

**\*\*\*Have you or will you be required to file a 2020 U.S. Federal Tax Return? Please circle: Yes or No**

**If no, please skip to Section F. If yes, please continue with Section E and indicate whether you used the IRS data retrieval tool or you will submit a 2020 tax transcript.**

**Instructions:** Complete this section if the parents filed or will file a 2020 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2020 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 parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2020 IRS income information into the student's FAFSA.
- The parent has not yet used the IRS Data Retrieval Tool but will use the tool to transfer 2020 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed.
- The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2020 IRS tax return transcript(s)**.

**Or Request:**

### **A 2020 IRS Tax Return Transcript: may be obtained through:**

- **Get Transcript by Mail** – Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

**\*\*\*NOTE:** If the parents filed separate 2020 IRS income tax returns, the IRS DRT cannot be used and the **2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules** must be provided for each.

- Check here if a **2020 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2020 IRS Tax Return Transcript(s)** will be provided later.  
**Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.**

**F. Verification of 2020 Income Information for Parent Nontax Filers**

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2020 income tax return with the IRS.

**Check the box that applies:**

- The parent(s) was not employed and had no income earned from work in 2020.
- One or both parents were employed in 2020 and did not file or was not required to file a 2020 tax return and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. [Provide copies of all 2020 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

**If more space is needed, attach a separate page with the student's name, Social Security Number or student ID at the top.**

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2020
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
<b>Total Amount of Income Earned From Work</b>		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021, that indicates a 2020 IRS income tax return was not filed with the IRS or other relevant tax authority.

- Check here if confirmation of non-filing is provided.
- Check here if confirmation of non-filing will be provided later.

NOTE: If you are not required to file a 2020 income return you must submit a "Verification of Non-filing Letter" from the IRS (filers of foreign returns would submit a comparable document) dated on or after October 1, 2021, attesting that you did not file a 2020 IRS income tax return. You can request a "Verification of Non-filing Letter" by completing and submitting the IRS Form 4506-T and checking box 7. The website for the IRS is [www.irs.gov](http://www.irs.gov). Please submit the form to the IRS not the school.

**G. Certification and Signatures**

Each person signing this worksheet certifies that all the information reported on it is complete and correct. The student and one parent must sign and date.

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

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

**Do not mail this worksheet to the U.S. Department of Education. Return completed forms to:**

**Oglethorpe University, Office of Financial Aid  
4484 Peachtree Rd., NE  
Atlanta, GA 30319  
(404) 504-1500 (voice)**