



OGLETHORPE UNIVERSITY

2023-2024 Verification Worksheet Independent Student

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 questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Independent 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. Independent Student's Family Information

List below the people in your household. Include:

- Yourself (student)
- 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, Social Security Number or student ID number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Marty Jones(example)</i>	28	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

Student's Name: _____ Student's ID Number: _____

C. Verification of 2021 Income Information for Student Tax Filers

1. **TAX RETURN FILERS - Important Note:** The instructions below apply to the student and/or 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.

*****Have you/spouse or will you/spouse (if married) be required to file a 2021 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/spouse used the IRS data retrieval tool or you/spouse will submit a 2021 tax transcript.

Instructions: Complete this section if the student and spouse (if married) 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 (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* 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 (and, if married, my spouse's) 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 (and, if married, my spouse's) 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.
- The student (and, if married, my spouse's) is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2021 IRS Tax Return Transcript(s)**- not photocopies of the 2021 income tax return. **See below the instructions on how to request a 2021 tax return transcript from the IRS.**

Or Request:

A 2021 IRS Tax Return Transcript: may be obtained through:

- **Get Transcript by Mail** – Go to 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, 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 student and/spouse (if married) filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** must be provided for each.

_____ Check here if a **2021 IRS Tax Return Transcript(s)** is provided.

_____ Check here if a **2021 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 2021 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- The student and/or spouse was not employed and had no income earned from work in 2021.
- The student and/or (if married, your spouse), was employed and did not file a 2021 tax return and has listed below the names of all the student's employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Provide copies of all 2021 IRS W-2 forms issued to the student (if married, your spouse), by employers. List every employer even if 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 number at the top.

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2021
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022, that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

NOTE: If you are not required to file a 2021 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, 2022, attesting that you did not file a 2021 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. Please submit the form to the IRS not the school.

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

E. Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

Spouse's Signature (optional)

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)**