



OGLETHORPE

UNIVERSITY

2025-2026

Verification Worksheet Independent Student

Your 2025-2026 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 Size includes the following:

- The student.
- The student's spouse, if applicable.
- The student's dependent children if the following are true:
 - They live with the student (or live apart because of college enrollment).
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
 - They live with the student;
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2025-2026 FAFSA. As a result, the student should not include any unborn children in the family size.

If more space is needed, provide a separate page with the student's name and ID number at the top.

| Full Name | Age | Relationship |
|----------------------|-----|--------------|
| Marty Jones(example) | 28 | Wife |
| | | Self |
| | | |
| | | |
| | | |
| | | |

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

C. Verification of 2023 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 2023 or had a change in marital status after December 31, 2023.

Instructions: Complete this section if the student and spouse filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2023 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules (i.e., 1, 2 and/or 3).**

A 2023 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.

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

D. Verification of 2023 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 2023 income tax return with the IRS.

Check the box that applies:

- ☐ The student and/or spouse were not employed and had no income earned from work in 2023.
- ☐ The student and/or spouse (if married) were employed and did not file a 2023 tax return and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form, or an equivalent document is provided.
- [Provide copies of all 2023 IRS W-2 forms issued to the student and 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 and student ID number at the top.

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2023 |
|--|---|------------------------------|
| <i>(Example) ABC's Auto Body Shop</i> | <i>Yes</i> | <i>\$4,500.00</i> |
| | | |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

NOTE: If you are not required to file a 2023 income return you must submit a "Verification of Non-filing Letter" from the IRS (tax filers of foreign returns would submit a comparable document) dated on or after October 1, 2023, attesting that you did not file a 2023 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)364-8305 (voice)