



What is Verification?

Your application was selected by the US Department of Education for a review in a process called "Verification." The Financial Aid Office must verify the information you reported on your FAFSA. If there are any differences, your FAFSA information may need to be corrected. The Financial Aid Office cannot make any federal financial aid payments available to you until all verification requirements have been met and the necessary corrections have been made.

What Are the Steps?

- 1 Order a TAX RETURN TRANSCRIPT from the Internal Revenue Service online at www.irs.gov or by phone at 1-800-908-9946. Obtain a 2015 Federal IRS Tax Return Transcript for yourself, your spouse (if married and your parents (if dependent).
- 2 Complete and sign this worksheet - you and at least one parent (if dependent) must sign.

A. Student and Family Information

| | | | |
|--------------------------|------------|----------|------------------------|
| Legal Last Name | First Name | MI | Social Security Number |
| Address (include apt. #) | | | Date of Birth |
| City | State | Zip Code | Cell Phone Number |

- Independent Students: List the people that you (and your spouse) will support between July 1, 2017 and June 30, 2018. Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2017 and June 30, 2018
- Dependent Students: List the people in your household between July 1, 2017 and June 30, 2018. Include yourself, your parents, and your parents' other children if your parents provide more than half of their support. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2017 - June 30, 2018.

Write the names of all family members, including yourself. Also, write the name of the college for any family member who will be attending college at least half-time between July 1, 2017 and June 30, 2018 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

| Name | Age | Relationship | College |
|------|-----|--------------|---------|
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B. Student's (and Spouse's) Income & Benefits Information

Check the appropriate boxes below and provide the requested information and documents.

- The student (& spouse) worked, filed taxes and have attached a 2015 IRS Tax Return Transcript(s) OR the 4606T form to allow OKWU to order.
- The student (& spouse) was not employed & had no income earned in 2015. If either student or spouse was employed, you must order a return transcript.
- The student (& spouse) worked in 2015 but did NOT file taxes. Listed below are the names of all employers, amounts earned, & included the W-2s.

| Employer Name | 2015 Amount Earned | W-2 included |
|---------------|--------------------|--------------|
| | \$ | |
| | \$ | |
| | \$ | |

- In 2014 or 2015, I received food stamp (SNAP) benefits. Attach documentation confirming the receipt of SNAP benefits.
- I paid child support in the amount of \$_____ (yearly total) in the year 2015 to _____ (name of adult recipient) for the following children _____ (name each child) residing at _____ (address).

C. Parents' Income & Benefits Information (Skip this section if student was born before 1/1/94, is married, has a child, is a veteran, or is in the graduate program.)

Check the appropriate boxes below and provide the requested information and documents.

- The parent(s) worked, filed taxes and have attached a 2015 IRS Tax Return Transcript(s) OR the 4606T form to allow OKWU to order.
- Neither parent was not employed & had no income earned in 2015.
- The parents worked in 2015 but did NOT file taxes. Listed below are the names of all employers, amounts earned, & included the W-2s.

| Employer Name | 2015 Amount Earned | W-2 included |
|---------------|--------------------|--------------|
| | \$ | |
| | \$ | |
| | \$ | |

- In 2014 or 2015, I received food stamp (SNAP) benefits. Attach documentation confirming the receipt of benefits.
- I paid child support in the amount of \$_____ (yearly total) in the year 2015 to _____ (name of adult recipient) for the following children _____ (name each child) residing at _____ (address).

D. Certification

I certify that all the information reported to qualify for Federal student aid is complete and correct. If your purposely give false or misleading information, you may be fined, be sentenced to jail or both.

Student's Signature

Date

Spouse or Parent's Signature

Date

2015 IRS Tax Return Transcripts may be obtained through the following methods:

- Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRs Tax Account Transcript."
- IRS2GO App: available through both Apple and Google Play app stores
- Telephone Request: 1-800-908-9946
- Paper Request Form: IRS Form 4506T-EX or IRS From 4506-T

Verification of 2015 Income Information for Individuals with Unusual Circumstances

The Department of Education realizes that no everyone has the same IRS Tax Return situation. They have provided the following guidance for students and parents with unusual circumstances related to their IRS Tax Return filing

Group A: Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2015 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 2015;
- 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 2015; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2015 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the

Group B: Individuals Who Filed an Amended IRS Income Tax Return

- A signed copy of the original 2015 IRS income tax return that was filed with the IRS or a 2015 IRS Tax Return Transcript; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Group C: Individuals Who Were Victims of Tax Administration Identity Theft

- A victim of tax administration identity theft who is not able to obtain a 2015 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 2015 IRS income tax return information.

Group D: Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2015 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:
 - o A signed copy of that 2015 income tax return(s); or
 - o A transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for tax year 2015.