

# V4/V5 - 2023–2024 Verification Worksheet

## Dependent Student

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for a review process. Certain applications are flagged by the federal processor due to federal edit. Due to this selection, the law says we must ask the student and at least one parent to confirm and provide information input on the FAFSA before awarding Federal Student Aid. To verify that you provided correct information a 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 to the financial aid office at your school. **Your school may ask for additional information. COMPLETE ENTIRE WORKSHEET AND SIGN THE END.**

### A. Dependent Student’s Information

Last Name	First Name	M.I.	Preferred Name	Oregon Tech ID # (or Social Security #)
Street Address (include apt. no.)			Date of Birth	
City	State	Zip Code	Email Address	
Home Phone Number (include area code)			Alternate Phone Number	

### B. Dependent Student’s Family Information

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

- Yourself and your parent(s) (including a stepparent) even if you don’t 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, 2023, through June 30, 2024, or if the other children would be required to provide parental 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 your parent(s).
- Other people if they 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, 2024.

**Note:** Include the name of the college for any household member (excluding parents), 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.

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>		

Instructions for using the IRS Data Retrieval Tool on the FAFSA:

If you have not already used the tool:

- Go to [FAFSA.gov](https://www.fafsa.gov) and log in to your FAFSA record

- Select “Make FAFSA Corrections”
- Go to the **Financial Information** section of the form.
- Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool and select **Link to IRS**.
- Enter in required fields and submit. Once information populates, check the box allowing the above information to transfer to the FAFSA and select **Transfer Now**. Make sure you and your parent have **signed and resubmitted** the FAFSA.

Instructions for retrieving Tax Transcripts or Non-Filing Letter:

- Go to [www.irs.gov](http://www.irs.gov)
- Select Get Your Tax Record
- Click on Get Transcript by MAIL or ONLINE
- Enter in required information and select continue (if you filed Married filing Joint make sure you are entering in the information for the first person listed on the tax return)
- Under type of transcript select Return Transcript or Non-Filing Letter and for tax year select 2021 then continue

### C. Dependent Student’s Income Information to Be Verified

Check the box that applies: (Only one box in this section needs to be selected)

I, the student, have used the **IRS Data Retrieval Tool** on FAFSA to transfer my 2021 IRS income information into my FAFSA on \_\_\_\_\_. (See instructions above for using the Data Retrieval Tool)  
*(Date Data Retrieval Completed)*

**\*\*Using the Data Retrieval option ensures a faster processing time for verification by the Oregon Tech financial aid office\*\***

The student’s 2021 **signed** IRS Tax Returns or IRS Tax Return Transcript(s) is attached. (See instructions above for getting IRS Tax Transcripts)

I amended my 2021 Federal Tax Return or Filed Jointly and am now Single. If a filer completed an amended tax return, the financial aid office will need a signed IRS Tax Return or Tax Return Transcript **and** a signed copy of the filed 1040x. If a filer completed a joint tax return but is now single because of a divorce, separation, or death of spouse, the W-2 forms for all income showing on the tax return transcript are required. A tax return transcript is required; **the IRS Data Retrieval Tool will be insufficient in this situation.**

Student was employed in 2021 and **was NOT required to file a Federal Tax Return** and has attached copies of all 2021 W-2 forms issued to you by employers. List every employer and amount earned for 2021 below:

Student Name	Employer’s Name	2021 Amount Earned
<i>Missy Jones</i>	<i>Suzie’s Auto Body Shop</i>	<i>\$2000.00</i>

Student **was not employed and had no income earned from work in 2021.**

### D. Parent’s Income Information to Be Verified—

If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

Check the box that applies: (Only one box in this section needs to be selected)

I, the student’s parent(s), have used the **IRS Data Retrieval Tool** on FAFSA to transfer my 2021 IRS income information into my FAFSA on \_\_\_\_\_. (See instructions above for using the Data Retrieval Tool)  
*(Date Data Retrieval Completed)*

**\*\*Using the Data Retrieval option ensures a faster processing time for verification by the Oregon Tech financial aid office\*\***

I, the student's parent(s), have attached my 2021 **signed** IRS Tax Returns or IRS Tax Return Transcript(s). (See instructions above for getting IRS Tax Transcripts)

I amended my 2021 Federal Tax Return or Filed Jointly and am now Single. If a filer completed an amended tax return, the financial aid office will need a signed copy of IRS Tax Return or Tax Return Transcripts **and** a signed copy of the filed 1040x. If a filer completed a joint tax return but is now single because of a divorce, separation, or death of spouse, the W-2 forms for all income showing on the tax return transcript are required. A tax return transcript is required; **the IRS Data Retrieval Tool will be insufficient in this situation.**

The parent(s) was employed in 2021 and **was NOT required to file a Federal Tax Return** and:

- have attached the IRS Tax Non Filing Letter (See instructions at the top of the 2<sup>nd</sup> page) **and**
- have attached copies of all 2021 W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer and amount earned for 2021 below:

Parent(s) Name	Employer's Name	2021 Amount Earned
<i>Missy Jones</i>	<i>Suzie's Auto Body Shop</i>	<i>\$2000.00</i>

The parent(s) **was not employed and had no income earned from work in 2021.** The parent(s) have attached the IRS Tax Non Filing Letter. See instructions at the top of the 2<sup>nd</sup> page.

### **E. Identity and Statement of Educational Purpose (To Be Signed at the Institution)**

The student **MUST APPEAR IN PERSON** at the Oregon Tech Financial Aid office to verify his or her identity by presenting valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport.

The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, **in the presence of an institutional official**, the following:

### Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending

\_\_\_\_\_ for 2023-2024.

(Name of Postsecondary Educational Institution)

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Student's Signature

Date

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School Officer's Name

Title

Document Received

Date

**\*\*If you are unable to bring the document in person to either the Oregon Tech Financial Aid office in Klamath Falls or to the Portland-Metro Campus, you will need to bring the documentation and this form to a notary to be completed. The section for the notary seal and signature is included on the next page of this worksheet\*\***

**Identity and Statement of Educational Purpose  
(To Be Signed With A Notary)**

If the student is unable to appear in person at Oregon Tech to verify his or her identity, the student must provide:

- (a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)  
Statement of Educational Purpose and that the federal student financial assistance  
I may receive will only be used for educational purposes and to pay the cost of attending  
\_\_\_\_\_ for 2023-2024.  
(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature) (Date)

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Notary's name)

personally appeared, \_\_\_\_\_, and provided to me  
(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of government-issued photo ID provided)  
to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**  
(seal)

\_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_  
(Date)

**F. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

**Student Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Parent Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Don't forget to make copies for your own records.*

*Please submit all documents to:*  
Oregon Tech Financial Aid Office  
3201 Campus Drive  
Klamath Falls, OR 97601

541.885.1280 (phone) 541.885.1024 (fax) [www.oit.edu/faid](http://www.oit.edu/faid) (website) dollars@oit.edu (e-mail)