V4/V5 - 2023–2024 Verification Worksheet Independent 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 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 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 required documents to the financial aid office at your school. Your school may ask for additional information. COMPLETE ENTIRE WORKSHEET AND SIGN AT THE END.

A. Independent Student's Information

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

B. Independent Student's Family Information

List below the people in your household. Include:

- Yourself and your spouse, if you are married.
- Your children, 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 criteria, 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.

Note: Include the name of the college for any household member who will be enrolled <u>at least half time</u>, 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
Marty Jones(example)	28	Wife	Central University	Yes
		Self		

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

If you have not already used the tool:

- Go to 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

in 2021 and:

- 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

Independent Student's Income Information to Be Verified	С.	Independent	Student's Incom	e Information t	o Be Verified
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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 in FAFSA on the Web to transfer my (and, if married, my spouse's) 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) コ 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. I, the student, (and/or the student's spouse if married) 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 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: Student/Spouse Name Employer's Name 2021 Amount Earned Missy Jones Suzie's Auto Body Shop \$2000.00

The student (and, if married, the student's spouse) was not employed and had no income earned from work

□ have completed the 2023-24 Low Income Statement available at www.oit.edu/faid/forms and

□ have attached the IRS Tax Non Filing Letter (See instructions at the top of the page)

D. 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	dat Clarks Walls	am the individual signing this	5
Statement of Educat	•	e) hat the federal student financial assista y the cost of attending for 2023-2024.	nce I may receive will only be
(Name of Postsecond	dary Educational In	stitution)	
Student's Signature			Date
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 Purp	ose and that the federal student financial assistan	ce			
	I may receive will only be used for educational purposes and to pay the cost of attending				
	for 2023-2024.				
(Name of Postsecondary Educa	tional Institution)				
					
(Student's Signature)	(Date)				
Nota	ary's Certificate of Acknowledgement				
Ctata of					
State 01					
City/County of					
					
On, before m	e,				
(Date)	(Notary's name)				
nersonally appeared.	, and provided t	to me			
	ed name of signer)				
•	ntification				
on basis of satisfactory evidence of fact	(Type of government-issued photo ID prov	 vided)			
to be the above-named person who sig	1,1	,			
WITNESS my hand and official seal					
(seal)					
	(Notary signature)				
My commission expires on					
iviy commission expires on	(Date)	-			
	(Batte)	Continue to Next Page →			
		John Merchande /			

By signing this form you certify that all the information	reported on it is complete and correct.
WARNING: If you purposely give false or misleading in sentenced to jail, or both.	formation on this worksheet, you may be fined
sentenced to jail, or both.	
Student	Dato

E. Sign this Worksheet

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 (website) dollars@oit.edu (e-mail)