

V4/V5 - 2026–2027 Verification Worksheet

Independent Student

Your 2026–2027 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	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, 2026 through June 30, 2027, or if the child would be required to provide your information if they were completing a FAFSA for 2026–2027. 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, 2027.

Full Name	Age	Relationship
<i>Marty Jones(example)</i>	28	<i>Wife</i>
		<i>Self</i>

Instructions for retrieving Tax Transcripts or Non-Filing Letter:

- Go to 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 2024 then continue

C. Independent Student’s Income Information to Be Verified

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

- The student (and spouse) has consented to use the Direct Data Exchange (DDX) on the FAFSA to retrieve and transfer 2024 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making a correction to the FAFSA
- Will provide the institution with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.
- I, the student, (and/or the student’s spouse if married) was employed in 2024 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 2024 W-2 forms issued to you (and, if married, to your spouse) by employers. List every employer and amount earned for 2024 below:

Student/Spouse Name	Employer’s Name	2024 Amount Earned
<i>Missy Jones</i>	<i>Suzie’s Auto Body Shop</i>	<i>\$2000.00</i>

- The student (and, if married, the student’s spouse) **was not employed and had no income earned from work in 2024** and:
 - have completed the **2026-26 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 _____ 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 2026-2027.

(Name of Postsecondary Educational Institution)

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****

(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 2026-2027.
(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)

Continue to Next Page →

E. Sign this Worksheet

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 information on this worksheet, you may be fined, sentenced to jail, or both.

Student _____ Date _____

Worksheet must be brought in person or mailed to:

Oregon Tech Financial Aid Office

3201 Campus Drive

Klamath Falls, OR 97601

541.885.1280

www.oit.edu/faid

