INSTITUTE OF TECHNOLOGY

IVW20

2019-2020

Independent Verification Worksheet

Your 2019–2020 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.

Independent Student's Information

Student's Last Name Student's First Name Student's M.I.

ID (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

Independent Student's Family Information

List below the people in **student's household**. **INCLUDE:**

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2019, through June 30, 2020, or if the child would be required to provide your information if they were completing a FAFSA for 2019–2020. Include children who meet either of these standards, 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, 2019.

Include the name of the college for any household member 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, 2019, and June 30, 2020. If more space is needed, attach a separate page with your name and CWID at the top.

Full Name	Age	Relationship	College	Will Be Enrolled in at **LEAST** Half Time
Missy Jones(example)	18	Self	OSUIT	YES

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Student Name_____
ID_____

Verification of 2017 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 2017 or had a change in marital status after December 31, 2017.

Instructions: Complete this section if the student and spouse filed or will file a 2017 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web.* In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2017 IRS income tax return information into the student's FAFSA.

☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2017 IRS income tax return information into the student's FAFSA once the 2017 IRS income tax return has been filed.

☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2017 IRS Tax Return Transcript(s)**.

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 income tax-return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of non-filing is provided.

___ Check here if confirmation of non-filing will be provided later

A **2017 IRS Tax Return Transcript** may be obtained through the:

Online Request - Go to www.IRS.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and ***NOT*** the "IRS Tax Account Transcript."

Telephone Request - 1-800-908-9946

In most cases, for electronic tax return filers, 2017 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2017 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2017 paper IRS income tax returns, the 2017 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2017 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the student and spouse filed separate 2017 IRS income tax returns, **2017 IRS Tax Return Transcripts** must be provided for each.

____ Check here if a **2017 IRS Tax Return Transcript(s)** is provided.
____ Check here if a **2017 IRS Tax Return Transcript(s)** will be provided later.

TAX RETURN NONFILERS—Important Note: Complete this section if the student, will not file and is not required to file a 2017 income tax return with the IRS. Note: Beginning this academic year, the U.S. Department of Education requires you to provide documentation from the IRS that indicates a 2017 IRS income tax return was not filed with the IRS.

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Student Name_____
ID_____

Check the box that applies:

☐ The student was not employed and had no income earned from work in 2017.

☐ The student was employed in 2017 and has listed below the names of all the student's employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is attached. Attach copies of **ALL** 2017 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and CWID at the top*.

Employer's Name	IRS W-2 Provided Y/N	Annual Amount Earned in 2017
Total Amount of Income Earned From Work		

Verification of 2017 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2017 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 2017;
- 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 2017; and
- A copy of IRS Form W–2 for each source of employment income received for tax year 2017 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2017.

Individuals Who Filed Amended IRS Income Tax Return

If an individual filed an amended **an** IRS income tax return for tax year 2017,
provide both of the following:

- A copy of the **2017 IRS Tax Return Transcript** requested from the IRS website; and
- A **signed copy** of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

- A victim of IRS identity theft who is not able to obtain a **2017 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2017 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual who filed or will file a 2017 income tax return with Puerto Rico, or 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 a signed copy of that 2017 income tax

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Student Name_____
ID_____

CERTIFICATION AND SIGNATURES

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, sentenced to jail, or both.**

_____
Student's Signature

_____
Date

_____
Spouse's Signature (Optional)

Please return form to:

OSUIT Financial Aid & Scholarships
1801 E. 4th St., Okmulgee, OK 74447
918.293.4684
918.293.4650 (fax)
OSUITFinancialAid@okstate.edu
https://osuit.edu/financial-aid/index.php

You should make a copy of this worksheet for your records.