



2024-2025

Dependent Verification Worksheet

Your 2024-2025 Free Application for Federal Student Aid (FAFSA) was selected for a review process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided the 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 and at least one parent 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.

Student Name: _____ CWID: _____

Dependent Student’s Family Information

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

- Yourself, even if you don’t live with your parents
• Your parent, or parents if married/living together, and/or stepparent if married, even if the student is not living with them. Exclude a parent who is deceased or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
• Any other children if the following are true:
o They live with the student’s parents (or live apart because of college enrollment),
o They receive more than half of their support from the student’s parents, and
o They will continue to receive more than half their support from the student’s parents during the award year.
• Other persons if the following are true:
o They live with the student’s parents,
o They receive more than half of their support from the student’s parents, and
o They will continue to receive more than half their support from the student’s parents during the award year.

The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S tax return at the time of completing the 2024-2025 FAFSA. As a result, the parent should not include any unborn children in the family size.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

Table with 3 columns: Full Name, Age, Relationship. Row 1: Self



Verification of 2022 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 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the student and spouse filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student’s FAFSA using income and tax information directly from the IRS. If 2022 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.

Check the box that applies:

- The student has used the FA-DDX to transfer 2022 IRS income tax return information into the student’s FAFSA.
- The student has not yet used the FA-DDX but will use the tool to transfer 2022 IRS income tax return information into the student’s FAFSA once the 2022 IRS income tax return has been filed.
- The student has attempted but is unable to use the FA-DDX and instead will provide the school a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 IRS Federal Tax Return, including the IRS Schedules 1,2, and 3 sent to IRS.

Verification of 2022 Income Information for Student Non-tax Filers

Important Note: The instructions and certifications below apply to the student and spouse (if the student is married.) Complete this section if the student and spouse will not file and are not required to file a 2022 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2022..
- The student and/or spouse were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student’s name and ID number at the top.

Employer’s Name:	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2022
Total Amount of Income Earned from Work		\$



Verification of 2022 Income Information for Parent Tax Filers

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the parents filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student’s FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the parents was not available or could not be used, the parents should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.

Check the box that applies:

- Parent(s) have used the FA-DDX to transfer 2022 IRS income tax return information into the student’s FAFSA.
- Parent(s) have not yet used the FA-DDX but will use the tool to transfer 2022 IRS income tax return information into the student’s FAFSA once the 2022 IRS income tax return has been filed.
- Parent(s) attempted but were unable to use the FA-DDX and instead will provide the school a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 IRS Federal Tax Return, including the IRS Schedules 1,2, and 3 sent to IRS.

Verification of 2022 Income Information for Parent Non-tax Filers

Important Note: The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2022 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed, and neither had income earned from work in 2022. By checking this box, I certify that I attempted to contact the IRS to receive a statement of non-filing (IRS 4506-T) for the tax year 2021.
- One or both parents were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student’s name and ID number at the top. By checking this box, I certify that I attempted to contact the IRS to receive a statement of non-filing (IRS 4506-T) for the tax year 2021.

Name of non-filing parent: _____ Circle one: Dad/Stepdad / Mom / Stepmom Employer’s Name:	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2022
Total Amount of Income Earned from Work		\$



Verification of 2022 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2022 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022 must provide:

- A signed statement listing the sources of any 2022 income and the amount of income from each source.
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022.
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2022; 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 2022.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Certification and Signatures

Each person signing this worksheet certifies that all reported information is complete and correct. The student and one parent must sign.

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

Parent's Signature

Date

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