

# 2023–2024 Verification Worksheet

## V1A-Dependent Student

Your 2023–2024 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 and your parents 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 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's Last Name	Student's First Name	Student's M.I.	Student's Social Security 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

### Number of Household Members and Number in College

Number of Household Members: List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's 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 the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other people's support and will continue to provide more than half of their support through June 30, 2024.

Number in College: Please include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution at any time between July 1, 2023, and June 30, 2024. Include the name of the college.

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

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

## **Student Tax Filers for 2021**

If you (the student) filed a 2021 federal tax return, please mark *one* of the following categories and submit the corresponding documentation to the Financial Aid Office. If you did not file taxes for 2021 and were not required to file, please skip to the next section for Student Non-Tax Filers on page 4.

### **Verification of 2021 IRS Income Tax Return 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 had a change in marital status after December 31, 2021.

Instructions: Complete this section if the student and spouse filed or will file a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2021 IRS income tax return 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 2021 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 2021 IRS income tax return information into the student's FAFSA once the 2021 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 **signed copy of the 2021 Federal Income Tax Return (IRS Form 1040) and the applicable schedules.**

If you do not have a copy of your 2021 Federal Tax Return, you may obtain a 2021 IRS Tax Return Transcript through the following methods:

- Get Transcript by Mail - Go to [www.irs.gov](https://www.irs.gov). Under the Tools heading, click "Get a transcript." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript Online - Go to [www.irs.gov](https://www.irs.gov). Under the Tools heading, click "get a tax transcript." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript and **NOT** the "IRS Tax Account Transcript." To use Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go-plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request - 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 days from the IRS's receipt of the telephone request.
- In-Person Request - You may request the form in person at the IRS Office at 55 N Robinson, Oklahoma City, OK 73102.

Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

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### ***Verification of 2021 IRS Income Tax Return Information for Students Who Filed an Amended IRS Income Tax Return***

An individual who filed an amended IRS income tax return for tax year 2021 must provide a signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return;
- A 2021 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 2021 Federal Tax Return (Form 1040) and the applicable schedules that were filed with the IRS.

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### ***Verification of 2021 Income Tax Return Information for Students 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.

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### ***Verification of 2021 IRS Income Tax Return Information for Students 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 2021 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.

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### ***Verification of 2021 IRS Income Tax Return for Individuals Granted a Filing Extension by the IRS***

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2021, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2021;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2021; **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 2021.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2021 tax account information.

**Student Non-Tax Filers for 2021**

If you did not file a 2021 federal tax return and were not required to file taxes, please complete this section. The instructions and certifications below apply to the student. Complete this section if the student will not file and is not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2021.
- The student was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 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 Provided?	Annual Amount Earned from Work
<i>(Example) Suzy's Auto Body Shop</i>	Yes	\$2,000
<i>Total Amount of Income Earned From Work</i>		\$

## **Parent Tax Filers for 2021**

If the student's parent(s), filed a 2021 federal tax return, please select *one* of the following categories and submit the corresponding documentation to the Financial Aid Office. If the parents did not file taxes for 2021 and were not required to file, please skip to the next section for Non-Tax Filers on page 7.

### **Verification of 2021 IRS Income Tax Return 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 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the parent filed or will file a 2021 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2021 IRS income tax return 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 parents have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA once the 2021 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **signed copy of the 2021 Federal Income Tax Return (IRS Form 1040) and the applicable schedules.**

If the parent(s) do not have a copy of the 2021 Federal Tax Return, they may obtain a 2021 IRS Tax Return Transcript through the following methods:

- Get Transcript by Mail - Go to [www.irs.gov](https://www.irs.gov). Under the Tools heading, click "Get a transcript." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript Online - Go to [www.irs.gov](https://www.irs.gov). Under the Tools heading, click "get a tax transcript." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript and **NOT** the "IRS Tax Account Transcript." To use Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go-plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request - 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 days from the IRS's receipt of the telephone request.
- In-Person Request - You may request the form in person at the IRS Office at 55 N Robinson, Oklahoma City, OK 73102.

Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript. If the parent(s) filed separate 2021 IRS income tax returns, signed 2021 IRS Tax Returns must be provided for each.

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### ***Verification of 2021 IRS Income Tax Return Information for Parents Who Filed an Amended IRS Income Tax Return***

An individual who filed an amended IRS income tax return for tax year 2021 must provide a signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return;
- A 2021 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 2021 Federal Tax Return (Form 1040) and the applicable schedules that were filed with the IRS.

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### ***Verification of 2021 Income Tax Return Information for Parents 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.

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### ***Verification of 2021 IRS Income Tax Return Information for Parents 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 2021 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.

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### ***Verification of 2021 IRS Income Tax Return Information for Individuals Granted a Filing Extension by the IRS***

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2021, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2021;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2021; **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 2021.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2021 tax account information.

## **Parent Non-Tax Filers for 2021**

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 2021 income tax return with the IRS.

Check the box that applies:

- The parent(s) in the household were not employed and had no income earned from work in 2021.
- One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. [Provide copies of all 2021 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.

Employer's Name	IRS W-2 Provided?	Annual Amount Earned from Work
<i>(Example) Suzy's Auto Body Shop</i>	Yes	\$2,000
<i>Total Amount of Income Earned From Work</i>		\$

**You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority. You may obtain this documentation by submitting IRS Form 4506-T and checking box 7.**

You can retrieve Form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Oklahoma filers can mail the form to the IRS, RAIVS Team, PO Box 9941, Mail Stop 6734, Ogden, UT 84409; or fax the form to (855) 298-1145. Once you receive the Verification of Non-filing Letter, you will take it to the Financial Aid Office at Francis Tuttle.

You may be able to request the Verification of Non-Filing Letter online through the automated transcript request. Visit [www.irs.gov](http://www.irs.gov) and click on "Get a Tax Transcript" under "Tools".

\_\_\_\_ Check here if the Verification of Non-filing letter is provided.

\_\_\_\_ Check here if the Verification of Non-filing letter will be provided later.

### **Certification and Signature**

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

**WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's ID Number

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (Required)

\_\_\_\_\_  
Date