

2019-2020 Verification Worksheet

Federal Student Aid Programs

Dependent

Your application was selected for review in a process called verification. In this process, NWOSU must compare information from your application with copies of your and your parent(s)' 2017 federal tax return transcript. This law says we have the right and responsibility to require this information before awarding Federal aid. If there are differences between your application and your other documents, corrections may need to be submitted.

A. Student Information

| | | | |
|--------------------------|------------|----------|----------------------------------|
| Last Name | First Name | M.I. | Social Security Number |
| Address (include apt. #) | | | Date of Birth |
| City | State | Zip Code | Phone Number (include area code) |

B. Family Information

Number of Household Members: List the people in the parent's household. Include:

- yourself;
- your parent(s) with whom you live (or last lived with) -include stepparent;
- your parents' other children if your parents provide more than half of their support from July 1, 2019, through June 30, 2020 or the children could answer "No" to every dependency status question and;
- any other people who now live with your parents and will continue to live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2019, through June 30, 2020.

Number in College: Include below information about any household member who will be enrolled at least half-time in a degree, diploma or certificate program at an eligible post-secondary institution any time between July 1, 2019, and June 30, 2020, include the name of the college.

| Full Name | Age | Relationship | College | Will be Enrolled At least half- Time? Yes or No |
|-----------|-----|--------------|--------------|--|
| | | Self | NWOSU | |
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(Attach a separate sheet if you need more room.)

C. Tax Forms and Income Information

- | | | |
|---|--|--|
| <input type="checkbox"/> I filed taxes. (attach tax return transcript) | <input type="checkbox"/> My father/stepfather filed taxes. (attach tax return transcript) | <input type="checkbox"/> My mother/stepmother filed taxes. (attach tax return transcript) |
|---|--|--|

FOR ALL NON-FILERS

- | | | |
|--|---|---|
| <input type="checkbox"/> I did not file taxes. (see non-filer form) | <input type="checkbox"/> My father/stepfather did not file taxes. (see non-filer form) | <input type="checkbox"/> My mother/stepmother did not file taxes. (see non-filer form) |
|--|---|---|

**Use your 2017 Federal Tax Return to complete this form.
If the answer is zero or the question does not apply, enter 0.**

| Parent(s) Yearly Amount | 2017 Additional Financial Information | Student Yearly Amount |
|----------------------------|--|--------------------------|
| \$ | Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31 | \$ |
| \$ | Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household. | \$ |
| Yes or No | In 2017 or 2018, did you, your parents, or anyone in your parents' household receive benefits from Supplemental Nutrition Assistance Program (SNAP) | Yes or No |
| Parent(s) Yearly Amount | 2017 Untaxed Income | Student Yearly Amount |
| \$ | IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total line 28 + line 32 or 1040A-line 17 | \$ |
| \$ | Tax exempt interest income from IRS Form 1040 - line 8b or 1040A - line 8b | \$ |
| \$ | Untaxed portions of IRA distributions from IRS Form 1040 - lines (15a minus 15b) or 1040A - lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here. | \$ |
| \$ | Untaxed portions of pensions from IRS Form 1040 - lines (16a minus 16b) or 1040A - lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here. | \$ |

All questions must be answered.

Sign this Worksheet

By signing this worksheet, I certify that all the information reported on this worksheet 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.

Parent's Signature Date Student's Signature Date

Northwestern Oklahoma State University

Office of Financial Aid

709 Oklahoma Boulevard • Alva, OK 73717 • (580) 327-8542 • <http://www.nwosu.edu/financial-aid-office>

2019-2020 AWARDING OF FINANCIAL AID

Congratulations on completing your FAFSA! We are now ready to begin processing your financial aid for 2019-2020. The following documents will assist us in the completion of your financial aid package from NWOSU. Documents will be returned to you should they arrive incomplete or unsigned. This could delay the review of your file by the Financial Aid Office.


- Institutional Verification Worksheet - This form is required to complete the verification process. **If a question does not apply, please fill the space with a zero.** Dependent students must also have a parent's original signature on this form.
- 2017 Federal **TAX RETURN TRANSCRIPT** from yourself (and spouse, if married), **and** your parent(s) if dependent; OR
- Use of the IRS Data Retrieval Tool on the FAFSA; OR
- Non-Filer Form- If you, your spouse, or your parent(s) did not file a tax return, complete the non-filer form.
- Other documentation may be required depending on your type of verification.
- If you have attended any prior education institutions, **all official academic transcripts** must be received in the NWOSU Registry Office. These documents are required to process your financial aid.
- Please notify the financial aid office of resources such as Vocational Rehabilitation, Veteran's Benefits, Oklahoma's Promise, Workforce Investment Act, Tribal Assistance, external scholarships, etc. **Expiration or ineligibility for continuation of these benefits should also be reported.**

Your award letter will be sent to you detailing your financial aid package upon the receipt and review of the above required documents **and** the submission of your admission application to Northwestern. Your financial aid **will not** be awarded or applied to your university account until you are **fully admitted and enrolled** at NWOSU.

If you have any questions concerning the application process, please contact the NWOSU Financial Aid Office at (580) 327-8542 – Alva Campus or (580) 213-3107 – Enid Campus

IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their tax return from the IRS in one of three ways.

 **If you are unable to complete any of these steps, you will be required to use the IRS Data Retrieval Tool on the FAFSA in order to be awarded financial aid.**

Online Request

- Visit the IRS website at www.irs.gov.
- In the **Tools** section of the homepage click “Order a Return or Account Transcript”.
- Under Step 3, select “Order a Transcript”.
- Click “OK” in the warning message that pops up.
- Enter the tax filer’s Social Security Number, date of birth, street address, and zip or postal code. **Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed.** However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click “Continue”
- In the Type of Transcript field, select “**Return Transcript**”. DO NOT request the Account Transcript. In the Tax Return field, select the year you wish to request. Again, please request “**Return Transcript**”.
- If successfully validated, tax filers can expect to receive a paper IRS **Tax Return Transcript** at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Transcripts requested online cannot be sent directly to a third party by the IRS.

Telephone Request

- Available from the IRS by calling 1-800-908-9946 or 1-800-829-1040.
 - Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
 - Select “**Option 2**” to request an IRS **Tax Return Transcript** and then enter the year you wish to request.
 - If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
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- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Paper Request Form- IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an **IRS Tax Return Transcript**.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tex.pdf>
- Complete lines 1-4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.
- Institutions are responsible for notifying aid application whether to list the institution as the third party to receive the transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.
- On line 6, enter the year to receive IRS tax information for the tax year that is required for the FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

Verification of 2019 High School Completion Status

Provide **one** of the following documents that indicate the student's high school completion status when the student will begin college in 2017-2018:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate, an official GED transcript that indicates the student passed the exam, or a state-authorized high school equivalent certificate.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a homeschooled student from a state where state law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a homeschooled student from a state where state law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

By signing this, I certify that all the documents provided are complete and correct.

Signature

Date

Warning: If you purposely provide false or misleading information, you may be fined, sentenced to jail, or both.

Student's Name

Student ID

**Verification of 2019-2020
Identity and Statement of Educational Purpose (To Be Signed at the Institution)**

The student must appear in person at _____ to
(Name of Postsecondary Educational Institution)

verify his or her identity by presenting a 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 by the institution with the date it was received and reviewed 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 the 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 2019-2020.
(Name of Postsecondary Educational Institution)

(Print Student's Signature)

(Student's ID Number)

(Student's Signature)

(Date)

(Student's Spouse, if married)

(Date)

(Parent's Signature, if dependent)

(Date)

(NWOSU Employee witnessing signature)

Student's Name

Student ID

Identity and Statement of Educational Purpose (To Be Signed With Notary)

If the student is unable to appear in person at _____
(Name of Postsecondary Educational Institution)
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 2019-2020.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Student's ID Number)

Notary's Certificate of Acknowledgement

Notary's certification may vary by State

State of _____

City/County of _____

On _____, before me, _____,

(Date)

(Notary's name)

personally appeared, _____, and proved 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)