

2019 - 2020 Verification Worksheet

Federal Student Aid Programs

Independent

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 2017 federal tax return transcript (and your spouse's, if you are married). 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 below the people in the student's household. Include:

- yourself and your spouse, if married;
- your children, if you provide more than half of their support from July 1, 2019, through June 30, 2020; and
- any other people who now live with you and receive more than half of their support from you and who will continue to live with you and receive more than half of their support from you 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 educational 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	

(Attach a separate sheet if you need more room.)

C. Tax Forms and Income Information

I filed taxes. (attach tax return transcript)

My spouse filed taxes. (attach tax return transcript)

FOR ALL NON-FILERS

I did not file taxes.
(see non-filer form)

My spouse 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.**

Student Yearly Amount	2017 Additional Financial Information
\$	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. <u>Don't include</u> support for children in your (or your parents') household.
Yes or No	In 2016 or 2017, did you, or anyone in your household receive benefits from Supplemental Nutrition Assistance Program (SNAP)
Student Yearly Amount	2017 Untaxed Income
\$	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.

_____ _____
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”.
- See “Get Transcript Online” or “Get Transcript by Mail”
- 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.

2019 – 2020 Verification Checklist

Use this checklist to complete the verification process.



Complete the Verification Worksheet provided.

- ALL questions require an answer. Please read the instructions carefully.
- Any incomplete worksheets will be sent back for completion.
- This form must be signed by you and your parent(s) if you are dependent;

AND



Provide your Federal Tax Transcript

- If you filed a tax return, you must provide this form.
- If you are considered DEPENDENT, you must provide this form for your parents;

OR



Use the IRS Data Retrieval Tool on your FAFSA.

- If you filed a tax return, you must complete this step.
- If you are considered DEPENDENT, your parents must complete this step;

OR



Complete the Non-Filer Form

- If you did not file a tax return, you must complete this form and attach ALL W2 forms from income earned.
- If you did not have any income or were self-employed, write how much money you earned on this form.
- If you are considered DEPENDENT, your parents must complete this step IF they did not file a tax return.

★ **These documents are required to complete the verification process.** Your financial aid will not be processed until you have completed the necessary steps for verification. If you have any questions or concerns regarding the verification process, please call (580) 327-8542 (Alva campus) or (580) 213-3107 (Enid campus).

Student Name

Student ID

Verification of 2017 Income Information for Student Nontax Filers

The instructions and certifications below apply to student included in the household. Complete this section if the student and/or spouse will not file and are not required to file a 2017 income tax return with the IRS.

Check the box that applies:

- The student and/or spouse were not employed and had no income earned from work in 2017.
- The student and/or spouse were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. [Provide copies of all 2017 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.

Employer's Name	Student or Spouse?	2017 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	Student	\$2000.00	yes

Note: We may require you to provide documentation from the IRS that indicates a 2017 IRS income tax return was not filed with the IRS.

By signing this worksheet, I certify that all the information reported on this worksheet is complete and correct.

Signature Date

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.