



OKLAHOMA WESLEYAN UNIVERSITY

2023-2024 Verification Worksheet - Independent Student

Your 2023-2024 FAFSA was selected by the Department of Education for review. Complete this form so that we may continue processing your aid application. We will compare your FAFSA with the information on this worksheet and any other required documents. If there are differences, your FAFSA information may need to be corrected.

- 1. YOU MUST ACCURATELY COMPLETE, REVIEW, AND SIGN THIS WORKSHEET.
2. PLEASE PRINT USING A BLUE OR BLACK PEN ONLY.

A. STUDENT INFORMATION

Form with fields: Last Name, First Name, Date of Birth, Student ID Number

B. INDEPENDENT STUDENT'S FAMILY INFORMATION

Complete the chart below for all members in your household that meet the definition here:

- 1. Yourself
2. Your spouse, if you are married.
3. Your children, if any, if you will provide more than half of their support from July 1, 2023, through June 30, 2024.
4. 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, 2024.

Table with 5 columns: Full Name of Each Household Member, Age, Relationship, College Name, Enrolled in at least 6 credits

Student Name: \_\_\_\_\_

**C. INDEPENDENT STUDENT AND SPOUSE’S FINANCIAL INFORMATION**

Student	Spouse Information (not needed if divorced/separated)
<input type="checkbox"/> I used the IRS Data Retrieval Tool (DRT) within the FAFSA to link taxes.	<input type="checkbox"/> Spouse used the IRS Data Retrieval Tool (DRT) within the FAFSA to link taxes.
<input type="checkbox"/> I filed a 2021 federal income tax return and <b>attached</b> the required copy of my 2021 IRS Tax Return Transcript	<input type="checkbox"/> Spouse filed a 2021 federal income tax and <b>attached</b> the required copy of their 2021 IRS Tax Return Transcript
<input type="checkbox"/> I earned income but did not file, nor was I required to file, a 2021 federal income tax return. As required, I am attaching copies of all 2021 W2s, 1099s, and other wage statements.	<input type="checkbox"/> Spouse earned income but did not file, nor was required to file, a 2021 federal income tax return. As required I am attaching copies of all 2021 W2s, 1099s, and other wage statements.
<b>MUST COMPLETE SECTION D</b>	<b>MUST COMPLETE SECTION D</b>
<input type="checkbox"/> I was not employed in 2021 and earned no income from work.	<input type="checkbox"/> Spouse was not employed in 2021 and earned no income from work.

**D. SOURCES OF EARNED INCOME AND AMOUNTS FROM 2021**

Only complete this section, if the above chart instructs you to do so. Must provide a W2\*\*.

Source of Income	Name of Income Earner	Relationship	2021 Total Amount Earned	W-2 Attached?
<i>Suzy Auto Body (example)</i>	<i>Sally Smith</i>	<i>Mother</i>	<i>\$22,000</i>	<i>Yes</i>

\*\*If you have tried and are unable to provide a W2 for the above source of income, please explain why the W2 is not available:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**E. CERTIFICATION AND SIGNATURE**

By signing this worksheet, you certify that all the information reported on this worksheet is complete, correct, and the required attachments are provided. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.**

\_\_\_\_\_

STUDENT SIGNATURE

\_\_\_\_\_

DATE

**F. SUBMIT**

Submit this completed form and accompanying documents to OKWU's Office of Financial Aid via one of these options. DO NOT SUBMIT VIA EMAIL AS WE CANNOT ACCEPT THEM.

- Online: [www.okwu.edu/upload](http://www.okwu.edu/upload)
- Fax: 918.335.6282
- Mail: OKWU Office of Financial Aid, 2201 Silver Lake Road, Bartlesville OK 74006

## HOW TO GET YOUR TAX INFORMATION

### **A 2021 Tax Return Transcript or Verification of Non-filing may be obtained through:**

- Get Transcript ONLINE – Go to [www.irs.gov](http://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 2021 for the year.
- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the IRS Tax Return Transcript and 2021 for the year.
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – This form is available in the Financial Aid Office.

### **To use the IRS Data Retrieval Tool (fastest and most secure way), the student first needs to:**

- Go to [fafsa.ed.gov](http://fafsa.ed.gov), and select the "Start Here" button
- Log in using your FSA ID
- Select the "Continue" or "Make a Correction" button
- Select the "Financial Information" tab from the top of the page

**Parent:** To use the DRT, complete the following steps:

1. Go to "Parent Financial Information" page Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
2. If eligible, select which parent is providing information on the FAFSA
3. Enter the FSA ID for the parent providing the information
4. Click "Link to IRS" (It looks like a greyed-out box) *For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on [fafsa.gov](http://fafsa.gov), the IRS DRT web page, and on the Student Aid Report. If you only need to update the parent tax information, then proceed to the Sign and Submit page.*

**Student:** To use the DRT, complete the following steps:

1. Go to "Student Financial Information" page
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool
3. If eligible, click "Link to IRS" *For your privacy, the tax information you transfer from the IRS into your FAFSA form won't be visible to you. Instead, you will see "Transferred from the IRS" in the appropriate fields on [fafsa.gov](http://fafsa.gov), the IRS DRT web page, and on the Student Aid Report.*
4. Proceed to the Sign and Submit page.