



Office of Financial Aid

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2023-2024 Verification Worksheet
V5 - Aggregate Group

Your application was selected for review in a process called "Verification." In this process, Ohio Wesleyan will be comparing information from your FAFSA with copies of your, your spouse's (if applicable), or your parent(s) 2021 Federal tax transcripts, or with W-2 forms or other financial documents.

STEP 1: STUDENT INFORMATION

Form with fields for Last Name, First Name, MI, Social Security #, Address, Date of Birth, City, State, ZIP Code, and Phone Number.

STEP 2: FAMILY INFORMATION

DEPENDENT Students

List the people in your Parent's household including:

- Yourself and your parent(s) - including step-parent and
• Your parents' other children, IF your parents will provide more than half of their support from July 1, 2023 thru June 30, 2024 OR the children would be required to provide parental information when applying for Federal Aid, and
• Other people if they now live with your parents, and your parents provide more than half of their support and will continue to from July 1, 2023 through June 30, 2024.

INDEPENDENT Students

List the people in your household including:

- Yourself, and your spouse, if you have one, and
• Your children, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, and
• Other people if they now live with you, and you provide more than half of their support and will continue to from July 1, 2023 through June 30, 2024.

Table with 5 columns: Full Name, Age, Relationship to Student, College, Will be Enrolled at least HALF TIME (Yes or No). Includes example rows for Mary Jones and SELF.

STEP 3: TAX FORMS AND INCOME INFORMATION (all applicants)

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web at FAFSA.gov. It takes up to 2 weeks for the IRS income information to be available for the IRS Data Retrieval Tool for electronic filers, and up to 8 weeks for paper

IRS tax return filers. Contact the Financial Aid Office if more information is needed about using the IRS Data Retrieval Tool.

• STUDENT Tax Forms and Income Information

1. Check only one box below.

- The STUDENT **has used** the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2021 IRS income information into the student’s FAFSA
- The STUDENT is **unable or chooses not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and will instead **provide the school with a 2021 IRS Tax RETURN Transcript(s) or 2021 Federal Tax Return(s)**. Tax RETURN transcripts can be requested from the IRS by using this link: <http://www.irs.gov/Individuals/Get-Transcript>.
- The STUDENT is unable to obtain a tax transcript, and **will provide a signed copy of their 2021 tax return**.
- Check here if you **will not file and are not required to file** a 2021 U.S. Income Tax Return

2. If you **did not file and are not required to file** a 2021 Federal income tax return, list below your employer(s) and any income received in 2021 (use W-2 or other earning statements if available)

Sources of Income – complete only if you did not file taxes	Amount Earned in 2021	W-2 Attached
Joe’s Auto Repair (example)	\$2,000 (example)	Yes (example)
	\$	
	\$	
	\$	

3. Funds **received** for all child support and other untaxed income (Question 45 of FAFSA)

Sources of Untaxed Income	2021 Amount	Other Sources of Untaxed Income	2021 Amount
Child Support	\$		\$
Worker’s Compensation	\$		\$
Untaxed Pensions	\$		\$

• SPOUSE’S or PARENT’S Tax Forms and Income Information

1. Check only one box below.

- The SPOUSE/PARENT **has used** the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2021 IRS income information into the student’s FAFSA
- The SPOUSE/PARENT is **unable or chooses not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and will instead **provide the school with a 2021 IRS Tax RETURN Transcript(s) or 2021 Federal Tax Return(s)**. Tax RETURN transcripts can be requested from the IRS by using this link: <http://www.irs.gov/Individuals/Get-Transcript>.
- The PARENT is unable to obtain a tax transcript, and **will provide a signed copy of their 2021 tax return**
- Check here if you **will not file and are not required to file** a 2021 U.S. Income Tax Return

2. If you **did not file and are not required to file** a 2021 Federal income tax return, list below your employer(s) and any income received in 2021 (use W-2 or other earning statements if available)

Sources of Income – complete only if you did not file taxes	Amount Earned in 2021	W-2 Attached
Joe’s Auto Repair (example)	\$2,000 (example)	Yes (example)
	\$	
	\$	
	\$	

3. Funds **received** for all child support and other untaxed income (Questions 94 Parents’ or 45 Spouse of FAFSA)

Sources of Untaxed Income	2021 Amount	Sources of Untaxed Income	2021 Amount
Child Support	\$		\$
Worker’s Compensation	\$		\$
Untaxed Pensions	\$		\$

STEP 4: HIGH SCHOOL COMPLETION STATUS

Provide **one of the following documents** that indicate the student's high school completion status

- A copy of the student's high school diploma; Continue to STEP 5.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded; Continue to STEP 5.
- A copy of the student's General Educational Development (GED) Certificate or other state-authorized examination that the State recognizes as the equivalent of a high school diploma. Continue to STEP 5.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- The student's academic transcript listing successful completion in at least a two-year program that is acceptable for full credit towards a bachelor's degree; Continue to STEP 5.
- Home School – the student's transcript or equivalent, signed by the parent or guardian, that lists the secondary school courses completed by the applicant and documents the successful completion of a secondary school; Continue to STEP 5.
- Home School – a secondary school completion credential for home school (other than a high school diploma or its recognized equivalent) provided for under State law; Continue to STEP 5.

STEP 5: IDENTITY/STATEMENT OF EDUCATIONAL PURPOSE

The student must meet with a Financial Aid Counselor **IN PERSON** and present the following documentation to verify the applicant's identity. Below are the items needed during the meeting:

- A valid government-issued photo identification, such as, but not limited to, a driver's license, other state-issued ID, or passport. OWU will maintain a copy of the photo ID that is annotated with the date it was received and reviewed and the name of the financial aid officer authorized to collect the student's ID.
- A signed statement (below) certifying that the Federal student financial assistance received will only be used for educational purposes to pay the cost of attending OWU for the 2023-2024 award year.

I certify, that I (print name) _____ am the individual signing this 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 OWU for 2023-2024.

If the student is unable to appear in person at OWU to verify his/her identity, the student must provide:

- A copy of the valid government-issued photo ID that is acknowledged in the notary statement below or that is presented to a **notary**, such as, but not limited to, a driver's license, other state-issued ID, or passport: and
- The original Statement of Educational Purpose, which is provided above, must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

STEP 6: CERTIFICATION AND SIGNATURES

By signing this worksheet, I/we certify that all the information reported on this worksheet to qualify for Federal student aid is complete and correct. If dependent, at least one parent must sign.

WARNING: This process is deemed required by the Federal Government. If you purposely give false information you may be fined, be sentenced to jail, or both.

Student _____ Date ____/____/____

Parent _____ Date ____/____/____

Return this form and ALL documentation to OWU Financial Aid Office.