



Office of Financial Aid

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2025-2026 Verification Worksheet V5 - Standard Group

Your FAFSA was selected for review process called “**Verification**.” In this process, Ohio Wesleyan University (OWU) will be comparing information from your FAFSA with copies of your, your spouse’s (if applicable), or your parent(s) **2023 Federal tax transcripts**, or with W-2 forms or other financial documents. The Department of Education requires us to process this information in order for you to receive Federal aid. If there are differences between your FAFSA information and your financial documents, we will send corrections electronically to have your information reprocessed. OWU must review the requested information under the financial aid program rules (CRF Title 34, Part 668).

STEP 1: STUDENT INFORMATION

Last Name First Name MI

Student ID

Address

Date of Birth

City State ZIP Code

()
Student Cell Number

STEP 2: FAMILY SIZE – Who to include?

DEPENDENT STUDENT:

- Yourself
- Your parents in the household where you reside while not in school, include a parent on active duty. Include step-parent if living in the same household.
- Your siblings - **IF** your parents will provide more than half of their support from July 1, 2025 thru June 30, 2026 **OR** the children would be required to provide parental information when applying for Federal Aid
- 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, 2025 through June 30, 2026.

INDEPENDENT STUDENT:

- Yourself
- Your spouse (if applicable)
- Your children - **IF** you will provide more than half of their support from July 1, 2025 thru June 30, 2026 **and** the children will continue to receive more than half their support from you during the award year.
- Other people if they now live with you and you will provide more than half of their support from July 1, 2025 through June 30, 2026.

Full Name	Age	Relationship
		<i>Self</i>

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 FA-DXX in FAFSA on the Web to transfer 2023 IRS income information into the student's FAFSA
- ☐ The STUDENT is **unable or chooses not to use** the FA-DXX Tool in FAFSA on the Web, and will instead **provide the school with a 2023 IRS Tax RETURN Transcript(s)**. Transcripts can be requested from the IRS 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 2023 tax return**.
- ☐ Check here if you **will not file and are not required to file** a 2023 U.S. Income Tax Return.

2. If you **did not file and are not required to file** a 2023 Federal income tax return, list below your employer(s) and any income received in 2023 (use W-2 or other earning statements if available).

Sources of Income – complete only if you did not file taxes	Amount Earned in 2023	W-2 / 1099 Attached?
Joe's Auto Repair (example)	\$2,000 (example)	Yes (example)
	\$	
	\$	
	\$	

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

1. Check only one box below.

- ☐ The SPOUSE/PARENT **has used** FA-DXX Tool in FAFSA on the Web to transfer 2023 IRS income information into the student's FAFSA
- ☐ The SPOUSE/PARENT is **unable or chooses not to use** the FA-DXX Tool in FAFSA on the Web, and will **provide the school with a 2023 IRS Tax RETURN Transcript(s)**. Tax Transcript 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 2023 tax return**.
- ☐ Check here if you **will not file and are not required to file** a 2023 U.S. Income Tax Return.

2. If you **did not file and are not required to file** a 2023 Federal income tax return, list below your employer(s) and any income received in 2023 (use W-2 or other earning statements if available).

Sources of Income – complete only if you did not file taxes	Amount Earned in 2023	W-2 / 1099 attached?
Joe's Auto Repair (example)	\$2,000 (example)	Yes (example)
	\$	
	\$	
	\$	

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 another 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 2025-2026 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 2025-2026.

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.