

Oklahoma Panhandle State University: Verification

3A. Tax Forms and Income Information

All tax filers must submit a copy of their 2016 IRS Tax Return Transcript *unless* they have transferred their 2016 income tax return information into the FAFSA using the IRS Data Retrieval Tool (IRS DRT) and have not subsequently changed that information. Please **DO NOT** submit copies of your 2016 federal 1040, 1040A, or 1040EZ tax returns, any IRS schedules (A, B, C, etc.), or state tax returns

- If either the student or a parent **did file** a 2016 federal tax return, that individual should go to Section 3B
- If either the student or a parent **did not file** a 2016 federal tax return, that individual should go to Section 3C.

3B. Verification of 2016 IRS Income Tax Return Information for Tax Filers

- | | |
|--|---|
| <input type="checkbox"/> The student or parent <u>has used</u> the IRS DRT in <i>FAFSA on the Web</i> to transfer 2016 IRS income tax return information into the student's FAFSA. | <input type="checkbox"/> The student or parent <u>has not yet used</u> the IRS DRT in <i>FAFSA on the Web</i> , but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA once the 2016 IRS income tax return has been filed. |
| <input type="checkbox"/> The student or parent is <u>unable or chooses not to use</u> the IRS DRT in <i>FAFSA on the Web</i> , and instead will provide the school a 2016 IRS Tax Return Transcript. | |

Directions for using the IRS Data Retrieval Tool (IRS DRT) or requesting a Tax Return Transcript

*The IRS DRT is available in the "Financial Information" sections of the student's FAFSA. Go to www.FAFSA.gov and, under Returning User, select "Login." Enter the student's name, SSN, and date of birth and select "Next." Then select "Make FAFSA Corrections." You will need to enter the student's PIN and create a new password before you can access the student's FAFSA. Once you are logged in, "Financial Information" is the fifth tab to the right. You will have the option to use the IRS DRT as long as you (student) or your parent has "Already Completed" an IRS income tax return (select "Already Completed" from the drop down box). You cannot use IRS DRT if you filed your tax return electronically within the past 3 weeks or by paper within the past 11 weeks. Once you use the IRS DRT for the student and/or parent, select the "Sign & Submit" tab. The FAFSA must be signed electronically with the student's and parent's PINs and re-submitted for processing. If you have any trouble with this process, feel free to call the Financial Aid Office for help.

** To obtain a **2016 IRS Tax Return Transcript**, go to www.IRS.gov and click on the "Get Transcript by Mail" link. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2016 IRS income tax return, and the address used on the 2016 IRS income tax return. In most cases, for electronic filers, a 2016 IRS Tax Return Transcript may be requested from the IRS within 2–3 weeks after the 2016 IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS Tax Return Transcript may be requested within 6–8 weeks after the 2016 paper tax return has been received by the IRS.

3C. Verification of 2016 Income Information for Nontax Filers

If the student or parent(s) were employed in 2016, they must list below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. Provide copies of all 2016 IRS W-2 forms issued to the student and parent(s) by their employers. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and ID number at the top. If a W-2 form is unavailable, attach a statement signed by the student and a parent explaining why the W-2 is unavailable and cannot be provided in a timely manner.

Name of Student/Parent	Employer's Name	2016 Amount Earned	IRS W-2 Provided?

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4. Verification of 2016 Untaxed Income Information

For the student and parent(s), answer each question below. If any item does not apply, enter "N/A" for Not Applicable where a response is requested, and enter 0 in an area where an amount is requested.

4a. Payments to tax-deferred pension and retirement savings

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans [e.g., 401(k) or 403(b) plans], including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.

Name of Person Who Made the Payment	Total Amount Paid in 2016

4b. Child support received

List the actual amount of any child support received in 2015 for the children in your household. **Do not include** foster care payments, adoption payments, or any amount that was court ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child for Whom Support Was Received	Amount of Child Support Received in 2016

4c. Housing, food, and other living allowances paid to members of the military, clergy, and others

Include cash payments and/or the cash value of benefits received. **Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2016

4d. Veteran's non-education benefits

List the total amount of veteran's non-education benefits received in 2016. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

Name of Recipient	Type of Veteran's Non-education Benefit	Amount of Benefit Received in 2016

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4e. Money received or paid on the student's behalf

List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2016. Include support from a parent whose information was not reported on the student's 2018–19 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions **unless the person is the student's parent whose information is reported on the FAFSA**. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Name of Recipient	Type of Other Untaxed Income	Amount of Benefit Received in 2016

5. Verification of 2016 Other Untaxed Income Information

For the student and parent(s), please list the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability benefits, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

Do not include any items reported or excluded in Section 4 above. In addition, do not include student aid, Earned Income Credits, Additional Child Tax Credits, welfare payments, Temporary Assistance for Needy Families (TANF) benefits, extended foster care benefits, untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, combat pay, on-base military housing or military housing allowance benefits, flexible spending arrangement (e.g., cafeteria plan) benefits, foreign income exclusions, or credits for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Amount Received in 2016

6. Supplemental Nutrition Assistance Program (SNAP) Benefits

Did anyone listed in **Section 2** receive SNAP benefits in 2016 or 2017?

- No. No one in the household received SNAP benefits in 2016 or 2017.
- Yes. A member of the household received SNAP benefits in 2015 or 2016.

Names of Household Members who received benefits:

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7. Child Support Paid

Child support you and your parent(s) paid because of divorce or separation or as a result of a legal requirement. Don't include child support you or your parent(s) paid for children living in your household.

Total amount of child support paid during 2016:	\$ _____	
Name of the person to whom child support was paid:	_____	
Names and ages of the child (children) for whom the child support was paid:	Child Name	Age
	_____	_____
	_____	_____
	_____	_____

8. Student's High School Completion Status

Provide one of the following documents indicating the student's high school completion status when the student will begin college in 2018–18. Check the box of the document you will attach to this worksheet.

- Office of Admissions has this documentation on file (no attachment necessary)
- High school diploma
- Final official high school transcript including graduation date when diploma was awarded
- Copy of the "secondary school leaving certificate" (or other similar document) for students who completed secondary education in a foreign country and are unable to obtain a copy of their high school diploma or transcript
- General Educational Development (GED) certificate or GED transcript
- State certificate or test transcript received after the student has passed a state-authorized examination the state recognizes as the equivalent of a high school diploma [e.g., High School Equivalency Test (HiSET), etc.]
- Academic transcript of a successfully completed two-year program acceptable for full credit toward a bachelor's degree
- If state law requires a home schooled student to obtain a secondary school completion credential (other than a high school diploma or its recognized equivalent), a copy of that credential
- If state law does not require a home schooled student to obtain a secondary school completion credential, a transcript or the equivalent signed by your parent or guardian, that lists the secondary school courses completed and documents the successful completion of a secondary school education in a home school setting
- DD Form 214, Certificate of Discharge from Active Duty, if it indicates student has a high school diploma or its equivalent

If you are unable to obtain any of the documentation listed above, you must contact our office.

9. Certification

By signing this worksheet, each person certifies that all the information reported on this form is complete and correct.

Student's Signature: _____ Date: _____

Student's Printed Name: _____

Parent's Signature: _____ Date: _____

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

2018–19 Identity and Statement of Educational Purpose

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 an unexpired 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 Statement of Educational Purpose provided below.

Identity and Statement of Educational Purpose (To Be Signed in the Presence of a 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 unexpired valid government-issued photo identification (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
- (b) The original Statement of Educational Purpose provided below, which 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.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

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 _____ for 2018-2019.

(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Student's ID Number)

Note: Please contact the financial aid office if you are unable to appear in person.