



OGLETHORPE UNIVERSITY

2026-2027 Verification Worksheet Independent Student

Your 2026-27 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Independent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's ID Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

B. Independent Student's Family Size includes the following:

- The student.
- The student's spouse, if applicable.
- The student's dependent children if the following are true:
 - They live with the student (or live apart because of college enrollment).
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
 - They live with the student;
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" mirror the requirement that family size align with those the student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2026-2027 FAFSA. As a result, the student should not include any unborn children in the family size.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship
Marty Jones(example)	28	Wife
		Self

Student's Name: _____ Student's ID Number: _____

C. Verification of 2024 Income Information for Student Tax Filers

****Did student and/or spouse file a 2024 income tax return: Please circle Yes or No.**

If student and/or spouse circled “No” please complete section D. If student and/or spouse circled “Yes” and did not have the 2024 income tax return transferred to the 2026-27 FAFSA, please use one of the income tax return options below to request your 2024 Tax Return Transcript.

Important Note: The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

Instructions: Complete this section if the student and spouse filed or will file a 2024 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2024 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2024 income information that was transferred into the students' FAFSA using income and tax information directly from the IRS.

If 2024 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules (i.e., 1, 2 and/or 3).**

A 2024 IRS Tax Return Transcript may be obtained through:

- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Sign in to your online account." Make sure to request the "Return Transcript" and NOT the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS Help Site.
- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form

Student's Name: _____ Student's ID Number: _____

D. Verification of 2024 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse (if the student is married.) Complete this section if the student and spouse will not file and are not required to file a 2024 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 2024.
- ☐ The student and/or spouse (if married) were employed and did not file a 2024 tax return and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form, or an equivalent document is provided.
- [Provide copies of all 2024 IRS W-2 forms issued to the student and spouse by employers. List every employer even if employer did not issue an IRS W-2 form.]

If more space is needed, attach a separate page with the student's name and student ID number at the top.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2024
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

E. Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

Student's Signature

Date

Spouse's Signature (optional)

Date

Do not mail this worksheet to the U.S. Department of Education. Return completed forms to:

Oglethorpe University, Office of Financial Aid
4484 Peachtree Rd., NE
Atlanta, GA 30319
(404)364-8305 (office number)