2026-2027 Verification Worksheet
Independent Student

Southwestern Oklahoma State University

Your application was selected for review, or "verification." We are required by federal law (34 CFR, Part 668) to compare the information from your Free Application for Federal Student Aid (FAFSA) with the information provided on this form. Please complete the entire form and ensure you sign the form. **Incomplete forms will be returned to you. No determination of aid eligibility can be made until all requested documents are received and reviewed.**

1. If you used the IRS Data Retrieval tool when completing the FAFSA and *did not* make any changes to that information, a 2024 tax return transcript is not necessary.
2. If you did not use the IRS Data Retrieval tool *or* you made changes after the IRS Retrieval, contact the IRS at www.irs.gov or call 1-800-908-9946 to obtain a 2024 Tax Return Transcript or submit a signed copy of your Tax Return.
3. Complete all sections and sign the worksheet.
4. If you did not file or are not required to file an IRS 1040, you must affirm that you are not required to file an IRS 1040 and include a copy of 2024 W-2 Forms from all employers.

A. STUDENT INFORMATION (PLEASE PRINT OR TYPE)

Student's Last Name | First Name | M.I. | Last 4 digits of SSN

Street Address (include apt. no.) | Date of Birth

City | State | Zip Code | Email Address

Cell Phone Number | Student ID #

B. FAMILY INFORMATION

List below the people in the student's household. Include:

- The student.
- The student's spouse if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2026, through June 30, 2027, even if a child does not live with the student.
- Other people, if they now live with the student and the student or spouse provides more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2027.

Number in College: Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2026, and June 30, 2027, and include the name of the college.

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

Full Name	Age	Relationship	College Attending in 2026-2027
		Self	*Southwestern Oklahoma State Univ.*

C. TAX FORMS AND INCOME INFORMATION - Check the appropriate boxes below.

TAX FILERS Check the space for those that provided or will provide a 2024 tax return transcript (Contact the Internal Revenue Service at 1-800-908-9946 or www.irs.gov to request a tax return transcript).

☐ You ☐ Your Spouse

TAX-FILERS Check the space for those that *Filed* a 2024 tax return and used the IRS Data Retrieval Tool on the FAFSA.

☐ You ☐ Your Spouse

NON-TAX FILERS: DID NOT WORK and DID NOT FILE TAXES IN 2024.

☐ You ☐ Your Spouse

NON-TAX FILERS: WORKED but DID NOT FILE; Check the space for those who DID NOT FILE 2024 Federal Income Tax Return and are not required to, list below the employer(s) and all income received in 2024. Provide a list of your employer(s) and any income received in 2024. (Provide W-2 forms or other earning statements).

☐ You ☐ Your Spouse

*FOR NON-TAX FILERS ONLY

Employer's Name	Income Earned From Work for Student	Income Earned From Work for Mother	Income Earned From Work for Father
Suzy's Auto Body Shop (example)	***$2000.00***		

D. Certifications and Signatures

Each person signing below certifies that all the information reported is complete and correct.
The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

_____ _____
Print Student's Name Student's ID Number

_____ _____
Student's Signature Date

You should make a copy of this worksheet for your records.

Complete and send to:

Southwestern Oklahoma State University
Student Financial Services
100 Campus Drive
Weatherford, Oklahoma 73096
SWOSU Title IV School Code: 003181
Fax: 580-774-7066

Verification of 2024 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual, who is required to file a 2024 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- A copy of IRS Form 4868, ‘‘Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,’’ that was filed with the IRS for tax year 2024.
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2024.
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2024.
- A copy of IRS Form W–2 for each source of employment income received for tax year 2024 and,
- If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2024.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2024 must provide:

- A **2024 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; ***and***
- A signed copy of the 2024 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Database View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; ***and***
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.