



Office of Financial Aid

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2024-2025 Verification Worksheet
V5 - Aggregate Group

Your FAFSA application was selected for review in a process called "Verification." In this process, Marion Technical College (MTC) will be comparing information from your FAFSA with copies of your, your spouse's (if applicable), or your parent(s) 2022 Federal tax transcripts, or with W-2 forms or other financial documents. The Dept. of Ed. requires MTC to process this information in order for the student 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. MTC must review the requested information under the financial aid program rules (CRF Title 34, Part 668).

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 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, 2024 thru June 30, 2025 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, 2024 through June 30, 2025.

INDEPENDENT STUDENT:

- Yourself
• Your spouse (if applicable)
• Your children - IF you will provide more than half of their support from July 1, 2024 thru June 30, 2025 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, 2024 through June 30, 2025.

Table with 3 columns: Full Name, Age, Relationship. Includes a row with 'Self' in the Relationship column.

### 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 retrieve and transfer 2022 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 2022 IRS Tax RETURN Transcript(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 2022 tax return.**
- Check here if you **will not file and are not required to file** a 2022 U.S. Income Tax Return.

2. If you **did not file and are not required to file** a 2022 Federal income tax return, list below your employer(s) and any income received in 2022 (use W-2 or other earning statements if available)

Sources of Income – complete only if you did not file taxes	Amount Earned in 2022	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** the FA-DXX Tool in FAFSA on the Web to retrieve and transfer 2022 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 2022 IRS Tax RETURN Transcript(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 2022 tax return.**
- Check here if you **will not file and are not required to file** a 2022 U.S. Income Tax Return.

2. If you **did not file and are not required to file** a 2022 Federal income tax return, list below your employer(s) and any income received in 2022 (use W-2 or other earning statements if available)

Sources of Income – complete only if you did not file taxes	Amount Earned in 2022	W-2 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;
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded;
- 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.
- 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;
- 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;
- 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;

## STEP 5: IDENTITY/STATEMENT OF EDUCATIONAL PURPOSE

The student must meet with a Financial Aid Counselor **IN PERSON** at MTC 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. MTC 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 MTC for the 2024-2025 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 MTC for 2024-2025.

**If the student is unable to appear in person at MTC 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. PLEASE DO NOT SIGN ELECTRONICALLY.**

Student \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Parent \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**Return this form and ALL documentation to MTC Financial Aid Office.**