Document request review

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Use this suggested local review before revising one student-facing request. Complete it with the responsible aid colleague. Use a fictional example and keep real personal records in approved institutional systems.

Fictional example. Omar finds a broad document list in a message sent to Tessa. He cannot yet connect every item to her case. He assigns the question for aid review. No award, eligibility, or case-completion decision has been made.

Owner and role

Source and version or publication date

Condition that makes this request apply

Document requested and the reason for this request

What the student sees Draft the exact words

Approved submission channel and help contact

Unresolved question and responsible reviewer

Review date and what would trigger another review

Status ☐ Ready for authorized approval ☐ Needs clarification ☐ Not applicable

Suggested practice only. Current official guidance and case-specific aid review govern requirements. This worksheet provides no financial advice. Do not record student tax, identity, or account information here.

Value claim review

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Review one public-facing claim with its evidence owner and communications owner. The fields below are editorial recommendations. Do not fill gaps with assumptions or present a typical result as an individual promise.

Fictional example. Beth finds that a draft earnings claim does not identify its population. She asks the source owner to resolve the scope before the wording is approved. No invented figure takes its place.

Owner and role

Source and version or publication date

Condition or scope Population and completion window

Earnings period and geography Who is missing from the data

Student costs included and costs outside the measure

What the student sees Draft the exact claim and necessary limits

Unresolved question and responsible reviewer

Review date and what would trigger another review

Status ☐ Ready for authorized approval ☐ Needs clarification ☐ Remove claim

Sources for context FSA GEN–26–06 (October 26, 2026); 2027–28 verification notice (October 23, 2026); IHEP state data practice recap (October 26, 2026). Read the episode article for the linked reference list. The worksheet fields are original recommendations, not official requirements.