

## 2024-2025 V5 Independent Verification Worksheet

**What is Verification?** – The Department of Education randomly selects a percentage of students for verification. Before awarding Federal Student Aid, we must collect documentation to verify the information reported on your FAFSA. FAFSA corrections may be required based on your provided documentation if there are discrepancies. During the verification process, it may be determined that additional documents are needed.

**Instructions:** Read this worksheet thoroughly and answer all questions. Return the worksheet and all requested documentation to the Financial Aid Office as soon as possible to prevent financial aid processing delays. Digital/e-signatures will not be accepted on any forms in the Verification process.

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 2022 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 2022 income information that was transferred into the student’s FAFSA using the income and tax information directly from the IRS.**

**If 2022 income tax information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

A 2022 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by Mail** – Go to [www.irs.gov](http://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.
- **Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record.” Click “Get Transcript Online.” Make sure to request the “Return Transcript” and NOT the “Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript is displayed online upon successful completion of the IRS’s two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. The 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.

### A. Student Information

Student Name	Student ID Number	School

**B. Family Size**

- My household size was transferred from the IRS to the FAFSA, and I did not manually change it. *(Skip to section C.)*
- I manually changed my household size on the FAFSA. *(Complete section B.)*

**List the people in your household, including:**

- 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 of their support from the student from July 1, 2024, through June 30, 2025.
- 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 of their support from the student from July 1, 2024, through June 30, 2025.

The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom 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 2024-2025 FAFSA. As a result, the student should not include any unborn children in the family size.

Provide a separate page with the student’s name and ID number at the top if additional space is needed.

Full Legal Name	Age	Relationship
		Self

**C. Student Tax Information**

1. Did you (the student) file a 2022 Federal Tax Return?
  - YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2022 IRS Tax Return Transcript OR a signed copy of your 2022 Federal Tax Return along with ALL applicable schedules. *(Skip to section D.)*
  - NO,** I did not, will not, and was not required to file a 2022 income tax return with the IRS. *(Must answer question 2 and sign.)*
2. **TAX RETURN NON-FILERS ONLY** – Complete this section if you (the student) will not file and are not required to file a 2022 income tax return with the IRS. Check the box that applies:
  - I was not employed and had no income earned from work in 2022.
  - I was employed in 2022. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)

Income earned from work: Use the W-2 or other earnings statements <i>(Non-tax filers only)</i>		
Employer(s) Name	2022 Amount Earned	W-2 Attached?
	\$	
	\$	

Signature of Student *(only if tax return non-filer)*: \_\_\_\_\_ Date: \_\_\_\_\_

**D. Spouse Tax Information (if applicable)**

Spouse Name: \_\_\_\_\_

- 1. Did the student’s spouse file a 2022 Federal Tax Return?
  - YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2022 IRS Tax Return Transcript OR a signed copy of your 2022 Federal Tax Return along with ALL applicable schedules. **(Skip to section E.)**
  - NO,** I did not, will not, and was not required to file a 2022 income tax return with the IRS. **(Must answer question 2 and sign.)**

- 2. **TAX RETURN NON-FILERS ONLY** – Complete this section if the spouse will not file and is not required to file a 2022 income tax return with the IRS. Check the box that applies:
  - I (the spouse) was not employed and had no income earned from work in 2022.
  - I (the spouse) was employed in 2022. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)

Income earned from work: Use the W-2 or other earnings statements ( <i>non-tax filers only</i> )		
Employer(s) Name	2022 Amount Earned	W-2 Attached?
	\$	
	\$	

Signature of Spouse (only if tax return non-filer): \_\_\_\_\_ Date: \_\_\_\_\_

**E. Certifying Signature (must be *written* signatures, not electronic)**

By signing below, I (the student) certify that all the information reported is complete and correct.

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

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Date

## **2024-2025 Statement of Educational Purpose (Instructions)**

*(From Appendix A of the Federal Register Notice posted September 19, 2023)*

### **Instructions for Postsecondary Institutions**

Students should appear in person at the school and present a valid and unexpired, government-issued photo identification (ID) such as a passport or a driver's license or other state-issued ID. You must maintain an annotated copy of that ID that includes the date it was received and the name of the person your school authorized to receive it.

Students must also sign a statement of educational purpose that certifies who they are and that the federal student aid they may receive will only be used for educational purposes and for the cost of attending the school for the 2024-2025 year.

A student who is unable to appear at the school must sign and submit the statement of educational purpose and he must submit a copy of his ID with the statement signed by a notary public confirming that the student appeared before her and presented the ID confirming his identity.

Please send the annotated copy of the ID along with this form to the FAO, so that we may complete verification.

### **Instructions for Notary Public**

The acceptable forms of ID are indicated in the "Verification by School Official" section of the second page of this document (the "2024-2025 Statement of Educational Purpose").

**2024-2025 Statement of Educational Purpose**

I certify that I (*Print student's 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 \_\_\_\_\_ (*Name of Postsecondary Educational Institution*) \_\_\_\_\_ for 2024-2025

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_  
Student's ID

Bottom portion to be completed by school and submitted to FAO:

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**Verification by School Official**

\_\_\_\_\_  
Name of school official

\_\_\_\_\_  
Title of school official

\_\_\_\_\_  
Name of Institution

I verify that the above listed student has appeared before me in person OR has presented their ID to a Notary and has presented the following documentation of their identity (select one)

- An unexpired Passport
- A valid unexpired Driver's license or other state-issued ID
- An alternate unexpired valid, government-issued ID \_\_\_\_\_ (state the ID type)

Furthermore, I have an annotated copy of this ID which includes the date it was received and the name of the person at this institution that was authorized to receive it.

\_\_\_\_\_  
Signature of Official

\_\_\_\_\_  
Date

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**Verification by Notary Public (Only to be used if student is unable to appear in person at the Institution)**

State \_\_\_\_\_ of

City/County \_\_\_\_\_ of

On \_\_\_\_\_, before me, \_\_\_\_\_

(Date)

(Notary's name)

personally appeared, \_\_\_\_\_, and provided to me

(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_

(Type of unexpired government-issued photo ID provided)

to the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

(seal)

\_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_ (Date)