

2025-2026 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 2023 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 2023 income information that was transferred into the student's FAFSA using the income and tax information directly from the IRS.**

If 2023 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 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

A 2023 IRS Tax Return Transcript may be obtained through:

- **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.
- **Get Transcript Online** – Go to 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, 2025, through June 30, 2026.
- 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, 2025, through June 30, 2026.

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 2025-2026 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 2023 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 2023 IRS Tax Return Transcript OR a signed copy of your 2023 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 2023 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 2023 income tax return with the IRS. Check the box that applies:
 - ☐ I was not employed and had no income earned from work in 2023.
 - ☐ I was employed in 2023. 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 (Non-tax filers only)		
Employer(s) Name	2023 Amount Earned	W-2 Attached?
	\$	
	\$	

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

Student Name: _____ Student ID #: _____

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D. Spouse Tax Information (if applicable)

Spouse Name: _____

- Did the student's spouse file a 2023 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 2023 IRS Tax Return Transcript OR a signed copy of your 2023 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 2023 income tax return with the IRS. *(Must answer question 2 and sign.)*
- TAX RETURN NON-FILERS ONLY** – Complete this section if the spouse will not file and is not required to file a 2023 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 2023.
☐ I (the spouse) was employed in 2023. 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	2023 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

Identity Verification Instructions

Students must complete identity verification for the 2025–2026 academic year using one of the following methods:

Option 1: In-Person Verification

The student appears in person at the college and presents a valid, unexpired, government-issued photo ID (e.g., driver's license, state-issued ID, or passport).

The college must retain an annotated copy of the ID that includes:

- The date the ID was received
- The name of the authorized college official who reviewed it

Option 2: Remote Verification via Video Call

If the student is unable to appear in person, they may verify their identity by participating in a live video call with an institutionally authorized representative.

During the video call:

- The student must present a valid, unexpired, government-issued photo ID
- The institution must retain a screenshot or scanned image of the ID that includes:
 - Clearly legible details of the ID
 - The date of the video call
 - The name of the authorized institutional representative who verified the ID

Identity Verification Certification

Students Name

Student's ID

Name of School Official

Title of School Official

Name of Institution

I verify that the above-listed student has verified their identity through one of the following approved methods (check one):

☐ **In-Person Appearance** – The student appeared in person before an authorized representative of the college and presented:

- ☐ An unexpired Passport
 - ☐ A valid, unexpired Driver's license or other state-issued ID
 - ☐ An alternate, unexpired, valid government-issued ID (please specify):
- _____

☐ **Remote Video Call** – The student presented a valid, unexpired government-issued photo ID during a live video call with an authorized representative of the institution.

- ☐ An unexpired Passport
 - ☐ A valid, unexpired Driver's license or other state-issued ID
 - ☐ An alternate, unexpired, valid government-issued ID (please specify):
- _____

I certify that an annotated copy of the presented identification is attached. This copy includes:

- The date the ID was reviewed or received
- The name of the authorized representative who reviewed it

Signature of Authorized Representative: _____

Date: _____